

Income Bonds application



It's easier and faster to apply online, simply scan this QR code or go to nsandi.com/IBSF



➤ Please complete this form if you're over 16 and want to invest in an NS&I Income Bonds account in your own name or jointly with one other person aged over 16.

➤ Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster.

➤ **Already have an Income Bonds account?**

If you want to deposit more money into your Income Bonds account, please use the simpler Income Bonds deposit form. You can download it from nsandi.com/forms or call us and we'll send you one.

1 Your initial deposit

amount £ p minimum £500, maximum £1 million per person

application reference number You can pay it by cheque or by switching from another NS&I account (see section 2). If paying by cheque, write the application reference number on the back.

2a Paying by cheque

Give details of the account on which your cheque is drawn.

name of account holder

account number sort code - -

2b OR by switching from another NS&I account

The NS&I account you switch from must be in your name or the name of the second investor, if applicable. If you switch from a fixed term investment that's not on sale, you won't be able to switch back. Any amount you take out from a Direct ISA may not be able to be paid back in during this tax year.

type of NS&I account switching from

account number or holder's number

If the amount you are switching will take the balance on your account below the minimum allowed, you must mark that you want to close the account.

If you want to switch from a fixed term investment, there are some restrictions. Please check the customer agreement (terms and conditions) for the investment you're switching from before you apply.

If you are switching from a fixed term investment, do you want to defer until it matures? (You can only defer within 30 days before the maturity date.)

yes no **A penalty may apply if you cash in all or part of a fixed term investment before its maturity date.**

If you want to close the account you are switching from, mark here

If you choose to close it, we'll automatically repay any remaining balance after the switch to your nominated bank or building society account on our records. Or, if we don't hold this, the account you nominate in section 5.

3 Your details

Please complete in full.

title date of birth (DD MM YYYY)

surname

forenames in full

address

postcode country of residence

nationality

phone number Preferably a mobile so we can reach you more easily.

email address

If you are resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

If you're resident for tax purposes in any country or territory outside the UK, please complete the fields below.

city of birth

country of birth

tax country

tax identification number

4 Second investor's details

Only complete if you are applying for a joint account.

Please complete in full.

If the second investor is resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

title	<input type="text"/>	date of birth (DD MM YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
surname	<input type="text"/>					
forenames in full	<input type="text"/>					
address	<input type="text"/>					
	<input type="text"/>					
postcode	<input type="text"/>	country of residence	<input type="text"/>			
nationality	<input type="text"/>					
phone number	<input type="text"/> Preferably a mobile so we can reach them more easily.					
city of birth	<input type="text"/>					
country of birth	<input type="text"/>					
tax country	<input type="text"/>					
tax identification number	<input type="text"/>					

If the second investor is resident for tax purposes in any country or territory outside the UK, please complete the fields below.

5 Nominated bank or building society account details

We need these details before we can accept the application.

All income and any withdrawals will be paid directly into this account. It must be a personal account in your name or the name of the second investor, held in the UK, which is able to receive payments by electronic transfer.

If it's an NS&I Direct Saver, just write 'NS&I' in the 'bank/building society' field, complete the 'name in which account is held' field and write the account number in the 'bank reference or building society roll no' field.

bank/building society	<input type="text"/>						
name in which account is held	<input type="text"/>						
account number	<input type="text"/>	sort code	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
bank reference or building society roll no (if applicable)	<input type="text"/>						

Please be careful when providing your bank details. If you enter the wrong details any payments you make might be delayed, or credited to the wrong account, and may result in a financial loss.

6 Your signature(s)

For joint accounts both you and the second investor must sign.

Declaration:
I/We have had the opportunity to read the customer agreement (terms and conditions) dated 1 July 2024.

first investor	<input type="text"/>	date (DD MM YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
second investor (if applicable)	<input type="text"/>	date (DD MM YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Your marketing preferences

We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

first investor	by post	<input type="checkbox"/>	by phone	<input type="checkbox"/>	by email	<input type="checkbox"/>	online	<input type="checkbox"/>
second investor (if applicable)	by post	<input type="checkbox"/>	by phone	<input type="checkbox"/>	by email	<input type="checkbox"/>	online	<input type="checkbox"/>

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

7 What to do next

- Remember to sign and date your form, then send it to:
NS&I, Sunderland SR43 2SB
If paying by cheque make it payable to 'NS&I'.