Declaration
Additional Permitted Subscription

Completing the form

Please ensure this form is completed accurately and in full for all the sections that are relevant to you and your adviser. If you are unclear about anything, please contact your adviser. Missing or unclear information may result in delays.

Returning the form

Please return the completed form via Jira messaging or by post to:

Nucleus,
PO Box 26968,
Glasgow,
G2 9DY

Signing the form

We can accept a handwritten or electronic signature.

If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

If you have any questions please contact us by email on:

client.relations@nucleusfinancial.com

Additional support

We recognise that personal circumstances, life altering events, or health issues could mean that you need some extra support. If there is anything we can do to help make dealing with us easier, please speak to one of our team and we'll work with you to put the right help in place. For more information on the types of support we can offer, visit nucleusfinancial.com/supporting-customers.

Your **Wealth**

The value of advice

If you have questions, we recommend speaking with your financial adviser. They'll be well placed to support you.

If you don't currently have an adviser and would like one, visit nucleusfinancial.com/yourwealth for guidance and information, including options that'll help you find a qualified adviser.

Cruse Bereavement Support

Cruse is the UK's leading bereavement charity. They've been helping people struggling with grief and bereavement for over 60 years.

More about Cruse, what they do and how to get in touch with them can be found at cruse.org.uk/about or call their Cruse helpline on 0808 808 1677.

Declaration
Additional Permitted Subscription

Client details

Name

Isa account number

National Insurance number

Deceased's details

Name

Isa account number(s)

Date of birth

Date of death

National Insurance number

Address

Town/City

Postcode

Date of marriage or civil partnership

Value of APS (at date of death or date when Isa(s) was closed)

£

Please note if multiple Isas were held by the deceased with the Isa provider their value will be combined to form one APS allowance.

Declaration
Additional Permitted Subscription

Nucleus declaration – additional permitted subscription

APS Allowance subscription information

I wish to subscribe

£

from my APS allowance in respect of the deceased.

I declare that

- I am the surviving spouse/civil partner of the deceased
- I was living with the deceased within the meaning of section 1011 of the Income Tax Act 2007 at the date of the deceased's death (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down)
- This subscription is made under the provisions of regulation 5DDA of the Isa regulations (additional permitted subscription)
- I am aged 18 years or over
- All subscriptions made, and to be made, belong to me

Please tick as appropriate

This subscription is being made by way of

☐ In specie transfers (movement of assets) – within 180 days of beneficial ownership passing to the surviving spouse/civil partner (only allowed where the APS allowance is being transferred to the same Isa manager the deceased's Isa was held with);

or

☐ Cash subscriptions – within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate.

Please note this Declaration must be submitted each time the additional permitted subscription is used.

Signature

I hereby declare that the contents of this declaration are true and accurate and have been completed to the best of my knowledge, information and belief.

I acknowledge that it is a serious offence to make false statements. False statements made in this declaration could lead to prosecution.

Signed

Date (dd-mm-yyyy)

– –

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Relay UK service on 18001 0131 226 9535.

0131 226 9535 client.relations@nucleusfinancial.com nucleusfinancial.com

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