

Further Additional Permitted Subscriptions (APS) (made by a Surviving Spouse or Civil Partner)

Before completing this form, you should ensure that you have already opened an ISA with Barclays specifically for your APS allowance. If you have not already opened an APS cash ISA, please complete a “Cash ISA Application Form – Using Additional Permitted Subscription (APS) Allowance” (form reference 9913817LP) instead.

Part 1 – Investor details

Title: Mr Mrs Miss

Other (please specify)

First name

Middle name(s) (if applicable)

Surname

Your permanent residential address

(We cannot accept a 'care of', PO Box or correspondence address.)

Postcode

Part 2 – Details of the Deceased

Title: Mr Mrs Miss

Other (please specify)

First name

Middle name(s) (if applicable)

Surname

Part 3 – APS Allowance Subscription Information – Instruction to Barclays

I (the investor) wish to subscribe an additional

£

from my APS allowance in respect of the deceased to my existing APS cash ISA with yourselves:

ISA Sort Code --

ISA Account Number

I enclose a cheque for the amount entered above, made payable in my name.

Please transfer the funds from my account with you:
(this must be a non-ISA product held with Barclays in YOUR name)

Sort Code --

Account Number

APS Eligibility Declaration

I (the investor) declare that:

- the subscription is made under the provisions of regulation 5DDA of the ISA regulations (this sets out the eligibility conditions and rules for these additional subscriptions, including the time limits and maximum value that may be subscribed)
- the subscription is being made within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate (where the deceased died in the period beginning with 3 December 2014 and ending on 5 April 2015, the 3 year time period commences on 6 April 2015)
- all subscriptions made, and to be made, belong to me.

I agree to the ISA terms and conditions

If you hold a **Power of Attorney** for the applicant named in Part 1, please attach a certified copy or original of the Power of Attorney with the application form and tick the appropriate box below. (All documents will be returned.)

- I confirm that the Investor named in part 1 is mentally incapable of making the application.
- I confirm that the Investor named in part 1 is physically incapable of making the application.

Please note that a Power of Attorney granted for convenience is not acceptable. We can only accept applications signed by an Attorney where the investor is unable to complete the application by reason of mental or physical incapacity.

I declare that this APS application form has been completed to the best of my knowledge and belief.

Signed

Date

DD/MM/YYYY

Part 4 – What to do once you’ve completed this form

Ensure all details have been completed clearly. Any information missing will delay your application being processed

You can either:

- Take this form to any branch of Barclays Bank UK PLC, or
- **Post the form to ISA Processing Team, Barclays Bank UK PLC, Leicester LE87 2BB**

For Bank Use Only – Additional ISA Subscription Checklist

Please refer to the ISA Servicing Helpdesk on bchat for any queries or search for “APS ISA” in KIT

Customer System Number

Customer has completed all fields

Customer has signed and dated the form

Name of Branch Staff

Staff Number

Branch Sort Code – –

Branch Telephone Number

Branch Stamp

How we use your personal data

Barclays is committed to protecting your personal data. We will use your information for a number of different purposes, for example, to manage your account(s), to provide our products and services to you and others and to meet our legal and regulatory obligations. We may also share your information with our trusted third parties for these purposes. For more detailed information on how and why we use your information, including the rights in relation to your personal data, and our legal grounds for using it, please go to barclays.co.uk/control-your-data or you can request a copy from us.

Credit Reference Agencies and Fraud Prevention Agencies

In order to process your application we will supply your personal information to credit reference agencies and fraud prevention agencies and they will give us information about you, such as about your financial history. We do this to assess creditworthiness and product suitability, check your identity, manage your account, trace and recover debts and prevent criminal activity. These agencies may in turn share your personal information with other organisations. If fraud is detected, you could be refused certain services, finance or employment. Once you open an account with us, we will share account data with the credit reference agencies on an ongoing basis.

If false or inaccurate information is provided to us and fraud is identified, details may be passed to credit reference and fraud prevention agencies to prevent fraud and money laundering and to verify your identity.

The Credit Reference Agency Information Notice (CRAIN) describes how the three main credit reference agencies in the UK each use and share personal data. The CRAIN is available on the credit reference agencies’ websites:

- callcredit.co.uk/crain
- equifax.co.uk/crain
- experian.co.uk/crain

Or you can ask us for a copy of these.

For more details on how information held by credit reference agencies and fraud prevention agencies may be used, please go to barclays.co.uk/control-your-data or you can request a copy from us.

You can get this in Braille, large print or audio by calling **0800 400 100*** (via Text Relay if appropriate) or by ordering online from barclays.co.uk/accessibleservices

Call monitoring and charges information

*Calls to 0800 numbers are free if made from a UK landline. Calls may be monitored and/or recorded for training and security purposes.

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