



APS Application Form

Client Details	
Full Name	
Permanent Residential Address	
Date of Birth	
National Insurance Number	
Details of Deceased	
Permanent Residential Address (at date of death)	
Date of Birth	
National Insurance Number	
Date of Death	
Date of Marriage or Civil Partnership	
Deceased Client Reference	

APS allowance

I (the investor) wish to subscribe £_____ from my APS in respect of the deceased and wish to make my subscription to my stocks and shares ISA in specie to the above amount or value as at date of death if lower.

Declaration

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)
- The subscription is made under the provisions of regulation 5DDA of the ISA regulations (additional permitted subscription)
- The subscription is being made
 - In the case of ‘in specie’ subscriptions, within 180 days of beneficial ownership passing to me, and
 - In the case of cash subscriptions, within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate
- I am aged 18 years of age or over
- All subscriptions made, and to be made, belong to me

I authorise Seccl Custody Limited to hold my cash subscription, ISA investments, interest dividends and any other rights or proceeds in respect of those investments and any other cash.

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

Signed.....

Date.....