



Additional Permitted Subscriptions (APS) Allowance Transfer Request

Use this form to request the transfer of an APS allowance from another ISA manager to us.

Before completing this form, you must have already opened an ISA with Barclays specifically for your APS allowance. If you haven't already opened an APS cash ISA, please complete a "Cash ISA Application Form – Using Additional Permitted Subscription (APS) Allowance" (form reference 9913815LP) and return it along with this APS allowance transfer request.

Only the allowance will be transferred, not the actual money or assets held in the deceased's ISA.

After the APS Allowance has been transferred to us, you can make deposits against the APS Allowance using the 'Further Additional Permitted Subscriptions' Form (form reference 9913817LP).

Please complete one form per ISA manager (e.g. bank) for each APS allowance to be transferred to us. Ensure all details have been completed clearly. Any missing information will delay your application.

Part 1 – Investor Details (applicant to complete)

Title: Mr Mrs Miss

Other (please specify)

First name

Middle name(s) (if applicable)

Last name

Permanent residential address
(We can't accept a 'care of', PO Box or correspondence address.)

Postcode

Date of birth

Permanent National Insurance number

or confirmation that you don't have one

Part 2 – Deceased Details (applicant to complete)

Title: Mr Mrs Miss

Other (please specify)

First name

Middle name(s) (if applicable)

Last name

I declare that the deceased's permanent address at the date of death was

Postcode

Permanent National Insurance number (if known)

or confirmation that the deceased didn't have one

Date of birth

Date of marriage or civil partnership between the investor and the deceased

Date of death

Part 3 – APS Allowance Transfer Information (applicant to complete)

Name of deceased's ISA Manager

Address of deceased's ISA Manager (if known)

Postcode

Deceased's ISA Details (if known)

Existing ISA Sort Code

Account Number

Plan reference (if applicable)

Please detail below any other ISAs held by the deceased with this ISA manager (if known)

If multiple ISAs were held by the deceased with the ISA manager, their value will be combined to form one APS allowance.

Sort Code	Account Number/Plan reference (if applicable)
<input type="text"/>	<input type="text"/>

An APS allowance can only be transferred once and only where no subscriptions have been made under that APS allowance. Once transferred, subscriptions may only be made in cash.

Part 4 – APS Eligibility Declaration

This section must be completed to confirm the investor named on this authority is eligible to transfer an APS allowance in respect of the deceased named on this authority.

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)
- I have not subscribed to and will not subscribe to the additional permitted subscription allowance with the existing ISA provider of the deceased in respect of the deceased named on this application
- I intend to make an additional permitted subscription application to Barclays Bank UK PLC.

I authorise the existing ISA provider of the deceased as specified above to provide Barclays Bank UK PLC with any information, written or non-written, concerning the APS allowance and former ISA in respect of myself (the investor) and the deceased and to accept any instruction from them relating to the APS allowance being transferred.

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

Signed

Date

If you're completing this application on behalf of the person named in part 1 and hold one of the following, we'll need to be provided a copy if you haven't shared one with us previously:

- Lasting Power of Attorney, Power of Attorney or Court appointment
- Appointment by the Court of Protection

Please provide a certified copy of the document you hold and attach it with the application form. **Please don't send original copies as they won't be returned.**

Part 5 – What to do next

Ensure all details have been completed clearly. Any missing information will delay your request.

You can either:

- Take the form to any Barclays branch, or
- Post the form to **ISA Team, Barclays, Leicester LE87 2BB**

Part 6 – Transfer Acceptance (Barclays use only)

We, Barclays Bank UK PLC, are willing to accept this APS allowance transfer in line with the investor's instructions above. We confirm that, subject to relevant checks, we are willing to accept an additional permitted subscription application from the investor.

Name: ISA Team

Address: Barclays
Leicester

Postcode: LE87 2BB.

For bank use only –

APS ISA allowance transfer checklist

For any queries search for "APS ISA" in Help Hub

CIS Number

Customer has completed all fields

Customer's residential address confirmed against FullServe (and doesn't include care of, c/o or PO Box)

Customer's Permanent National Insurance number supplied (or customer has ticked 'No' for National Insurance number)

Customer has signed and dated the request

Name of Branch Staff

Staff Number

After completing this checklist, send this form to OS&D using Scan to eDocs, or send it to the address on the above.

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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