



Further APS Subscriptions made by a Surviving Spouse or Civil Partner

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

Part 1 – Investor details

Title: Mr Mrs Miss

Other (please specify)

First name

Middle name(s) (if applicable)

Last name

Your permanent residential address

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

Postcode

Part 2 – Deceased Full Name

Part 3 – APS Subscription Details

I (the investor) wish to subscribe an additional

£

from my APS allowance to my APS cash ISA with you:

ISA Sort Code 20--

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)**

ISA Sort Code 20--

ISA Account Number

APS Eligibility Declaration

I declare that:

- the subscription is made under the provisions of regulation 5DDA of the ISA regulations (additional permitted subscription)
- 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
- all subscriptions made, and to be made, belong to me
- I agree to the ISA terms and conditions

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

Signed

Date

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Part 4 – What to do next

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

You can either:

- Take this form, with your cheque if that's your chosen payment method, to any Barclays branch, or
- Post the form to **ISA Team, Barclays, Leicester LE87 2BB** - remember to enclose your cheque if that's your chosen payment method.

Bank Use Only –

APS ISA Subscription Checklist

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

CIS Number

Customer has completed all fields

Customer has signed and dated the form

Staff Name

Staff Number

If your customer isn't paying a cheque into their APS ISA, send this form to OS&D using Scan to eDocs. Otherwise send the form and cheque to the address 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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