



# Request for an Additional Permitted Subscription (APS) Allowance Valuation

**This form isn't required if you've completed a "Cash ISA Application Form – Using Additional Permitted Subscription (APS) Allowance" (Form Reference 9913815LP)**

## What is an APS Allowance?

When an ISA investor dies, their surviving spouse or civil partner is entitled to make use of the APS allowance in addition to their personal annual ISA allowance.

The subscriptions you can make will be the higher value of the deceased's ISA(s) as at their date of death, or at the point of closure. The closing balance will usually be higher as we continue to pay tax-free interest into the ISA(s). You may wish to wait until the deceased's ISA is closed before requesting the APS valuation or taking any action to use the APS allowance.

### 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

Date of birth / /

### Part 2 – Deceased details

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

or confirmation that the deceased didn't have one

Date of birth / /

Date of death / /

Date of marriage or civil partnership between you and the deceased / /

### Part 3 – Deceased's ISA details

Please list any cash ISAs held by the deceased with Barclays at the date of death

Sort Code(s)	Account Number(s)
<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### APS Eligibility 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).
- I declare that this APS 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 4 – What to do next

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

You can either:

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

Once we have received your request, our ISA team will identify all ISAs your Spouse or Civil Partner held with Barclays Bank UK PLC and respond to you in writing with the total APS allowance available to you.

## For Bank Use Only – APS Enquiry 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

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

---

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.

Barclays Bank UK PLC. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No. 759676). Registered in England. Registered No. 9740322. Registered Office: 1 Churchill Place, London E14 5HP.

Item Ref: 9914029LP\_UK Created: 12/24