

Office Use Only				
Scan ref:	ISAAPP			
Internal ref:	AE		Code	

Title (Mr/Mrs/Miss/Other)	Surname
Full forenames	
Permanent residential address	
Postcode	
Date of birth D D M M Y Y Y Y	National Insurance No.
Telephone	Email address
WCIM account number	Executive who handles your account

I apply to subscribe	£	to a Stocks & Shares ISA Investment for the tax year	Y Y Y Y / Y Y Y Y
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☐ Yes

Name of bank or building society																
Bank address																
	Postcode															
Title of account																
Building society roll number (if applicable)																
Sort code			-			-			Account number							

E Authorisation and Declaration

I authorise Pershing Securities Limited, the ISA manager, to open a Stocks & Shares ISA on my behalf for the tax year shown above and each subsequent tax year until further notice. I declare that:

- All subscriptions made and to be made, belong to me.
- I am 18 years of age or over.
- I have not subscribed and will not subscribe more than the overall ISA subscription limit total in the same tax year.
- I am resident and ordinarily resident in the UK for tax purposes, or if not so resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to or in a civil partnership with a person who performs such duties. I will inform Pershing Securities Limited if I cease to be resident and ordinarily resident or to perform such duties or to be married to a person who performs such duties or in a civil partnership with a person who performs such duties.
- The information given within this form has been completed to the best of my knowledge.
- I have read, understood and agree to the ISA Terms and Conditions and agree that my account will be operated in accordance with them.

I authorise Pershing Securities Limited:

- To hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of these investments and any other cash.
- To make on my behalf any claims to relief from tax in respect of ISA investments.

I understand that Pershing Securities Limited will notify me if by reason of failing to meet the provisions of the ISA rules my account is or will become void.

I will inform Pershing Securities Limited of any change of circumstances affecting the information given in this form without delay.

Signature

Date

- Note:
- This Application Form and our Terms of Service and Business, which taken together, set out the basis of your relationship with WCIM. We intend to rely on these documents and for your own benefit and protection, you should read the terms carefully before signing this Form. If you do not understand any item therein, please ask for further details.
  - The **Terms of Service and Business** can be found on [www.wcgplc.co.uk/business](http://www.wcgplc.co.uk/business). If you require a printed copy of the Terms of Service and Business, please contact [client.services@wcgplc.co.uk](mailto:client.services@wcgplc.co.uk) or 020 3100 8662.

For any questions please contact Walker Crips Investment Management on 020 3100 8662, by email at [client.services@wcgplc.co.uk](mailto:client.services@wcgplc.co.uk), or by mail to Walker Crips Investment Management, 128 Queen Victoria Street, London EC4V 4BJ.

For Office Use Only		
Reviewed by AE		Executive Notes
AE Name		