

To request the value of a deceased account holder's ISA, for the purpose of utilising a spousal APS Allowance, please complete and return this form. If you have any questions about this form please contact our Customer Experience Centre on **0345 300 0430**.

Please complete all fields in this form (where applicable).

Section A		Requestor (Spouse) Details			
Requestor Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="text"/>
Requestor Full Name(s)	<input type="text"/>				
Requestor Date of Birth	<input type="text"/>				
Requestor National Insurance Number	<input type="text"/>				
Do you have an existing Shareview Dealing ISA?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	If so, what is the Account Number?	<input type="text"/>	

Section B		Details of the Deceased			
Deceased Full Name(s)	<input type="text"/>				
Permanent Residential Address of the deceased at their date of death	<input type="text"/>				
Deceased Date of Birth	<input type="text"/>				
National Insurance Number (if known):	<input type="text"/>				
Date of Death	<input type="text"/>				
Deceased ISA Number(s)	<input type="text"/>				

Section C		APS Eligibility Declaration	
<b>I declare that:</b>			
<ul style="list-style-type: none"><li>I am the surviving spouse / civil partner of the deceased</li><li>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)</li></ul>			
I hereby declare that this APS allowance request has been completed to the best of my knowledge and belief.			
Signed	<input type="text"/>	Date	<input type="text"/>

Next Steps	
Please return this form to: <b>Equiniti, Po Box 4605, Aspect House, Spencer Road, Lancing, West Sussex, BN99 6QY</b>	
Once approved, you can make subscriptions to the APS Allowance, in your Shareview Dealing ISA, by completing and returning an <b>Additional Permitted Subscription Payment Form</b> .	