

ISA – Additional Permitted Subscription (APS) Valuation Request

Before we can disclose details of the additional ISA allowance, known as an Additional Permitted Subscription (APS), to the surviving spouse/civil partner, we are required by HM Revenue and Customs (HMRC) to obtain a declaration from you (the spouse/civil partner) to verify your entitlement to the allowance. If you wish to receive further details, please complete the Declaration below and return it to us in the pre-paid envelope provided. Once we receive the completed Declaration, we'll send you a letter confirming the APS allowance(s) available to you within 14 days.

To HSBC - please provide details of the additional ISA APS allowance available to me (the spouse/civil partner).

Details of the Deceased	
Our Reference (on covering letter)	
Deceased full name(s):	
Permanent residential address of the deceased at their date of death (including post code):	
Deceased date of birth:	
Date of death:	
Deceased national insurance number (if known):	
Date of marriage or civil partnership between the investor and the deceased:	
Spouse/Civil Partner Details	
Spouse/Civil Partner full name:	
Permanent residential address (including post code):	

I declare that: *(Please delete options below where not applicable)*

- 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.

Where Power of Attorney or Court Order is in place

- I am authorised to complete and sign this form on behalf of the surviving spouse/civil partner under the terms of a Power of Attorney or Court Order and I can provide HSBC with a copy of the appropriate document if required.

Signed

Name

(V.2 22/01/20)

HSBC UK Plc

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