



# ISA Additional Permitted Subscription

We're currently rebranding from Novia to Wealthtime. You'll notice that some of our products and services still use the name Novia while we're transitioning over to the new name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

This form can be completed to make additional permitted subscriptions to your Novia ISA. **If the deceased held ISAs with multiple ISA managers, please complete one form for each ISA manager.** Once completed, please sign the declaration on page three using a blue or black pen. Then scan the form and send it to us by secure email. Alternatively, you can send the form by post to Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR.

## Investor Details

Mr    Mrs    Miss   Other:

Surname:    Date of birth (dd/mm/yyyy):

Forename(s):

Investor number:

Wrapper number:

National Insurance number:

Failure to provide your correct National Insurance number can make your ISA invalid, meaning that you will lose the tax benefits.

Expected amount of additional permitted subscription:

I wish to apply to make an additional permitted subscription in respect of the deceased ISA holder detailed below to whom I was married/in a civil partnership with at the time of their death.

## Full Details of the Deceased

Mr    Mrs    Miss   Other:

Surname:    Date of birth (dd/mm/yyyy):

Forename(s):

Date of death(dd/mm/yyyy):

Date the marriage/civil partnership took place(dd/mm/yyyy):

National Insurance number (if known):

House number/name:

Street name:

District:

Town/city:

County:

Country:

Postcode:

### Details of the ISA manager Holding the Deceased's ISA(s)

ISA manager name:

Building number/name:

Street name:

District:

Town/city:

County:

Country:

Postcode:

Reference number(s) for the deceased's ISA(s) (if known):

If the ISA manager is Novia, please confirm how the additional permitted subscription should be completed.

Internal cash transfer  Internal asset transfer

If the ISA manager is not Novia, please be aware that we need to receive confirmation of the additional permitted subscription limit from the external ISA manager before any APS money is paid to us.

## 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;
- I am making the additional permitted subscription under the provisions of regulation 5DDA of the ISA regulations;
- I am making the subscription within 3 years of the date of death, or if later, within 180 days of the completion of the administration of the estate;
- Where the deceased's ISA was held with an ISA manager other than Novia, I have not made nor will I make any additional permitted subscriptions to that ISA manager in respect of that ISA.
- Where the deceased's ISA was held with an ISA manager other than Novia, I permit you to share with that ISA manager any information that is necessary to validate my additional permitted subscription, including the sending of this form.

Applicant signature:

Print name:

Date (dd/mm/yyyy):

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If you require this document in an alternative format please contact us.

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