

Re-register your ISA to top up for the tax year 2022-2023

Maturing account number

I apply to subscribe to my fixed rate ISA for the tax year:

2022-2023

If you're depositing your 2022-2023 ISA allowance into a re-investment ISA, you need to complete this form to re-register your account, **before you deposit any funds**. Alternatively, you can re-register your account by phone or at any branch following maturity. For further information please see the leaflet enclosed 'Your next steps at maturity'.

Please tick **one** box to indicate which re-investment ISA you want to top-up

Option A Option B Option C

Customer details - all sections must be completed in full

Title

First name

Surname

Address

(including postcode)

Date of birth

dd / mm / yyyy

Telephone number

Email address

Nationality

Additional country of nationality (if applicable)

Do you have a National Insurance number?

Yes

No

If yes, National Insurance number

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(You should be able to find your National Insurance number on a pay slip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP, or pension order book.)

Declaration

I would like to apply to subscribe for a cash ISA for this tax year and each successive year until further notice.

I declare that:

All subscriptions made, and to be made, belong to me;

- I am 16 years of age or over;
- I have not subscribed/made payments, and will not subscribe/make payments, more than the overall subscription/payment limit* in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA and a lifetime ISA in the same tax year;
- I have not subscribed and will not subscribe more than the cash ISA subscription limit* to a cash ISA;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA; and
- I am resident in the United Kingdom 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 Coventry Building Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties;
- This ISA will not be used as security for any loan or borrowing.

I authorise:

- Coventry Building Society to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;

and

- to make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.

I declare that this application form has been completed to the best of my knowledge and belief.

Signature

Print name

Date

dd / mm / yyyy

* For more information on current ISA limits, please contact us.