

# NFU MUTUAL SELECT INVESTMENTS ISA SINGLE PAYMENT TOP UP FORM 2023/24 TAX YEAR

## SECTION 1. PERSONAL DETAILS

Please complete all pages of this form using **BLACK INK & BLOCK CAPITALS.**

Completed forms should be sent to:

**NFU Mutual  
Avon House,  
Ryon Hill Park,  
Warwick Road,  
Stratford-Upon-Avon,  
CV37 0UY**

If you have any questions about completing the form, please call us on **0800 622323.**

## SECTION 2. PAYMENT DETAILS

Use this section to provide your payment requirements.

## SECTION 3. YOUR BANK ACCOUNT DETAIL FOR INCOME PAYMENTS

If you wish us to pay the income into your bank account, please complete this section and send us proof of ownership for the account as follows:

- copy bank statement, or
- cancelled cheque, or
- paying-in slip

You don't need to complete this section if you have already given us your account details.

Full name(s) of owner(s):

Plan number:

Address:



Postcode

Contact telephone number:

National Insurance Number:

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**PLEASE MAKE A ONE OFF PAYMENT INTO MY INVESTMENT AS FOLLOWS:**

Payment amount:

£

Invest in to my existing fund choice:

Or

Invest in to a new fund choice:

Fund name(s)	% of payment	Tick one option for each fund chosen		
		Reinvest income	Pay income into my bank account	Pay income into product cash
	100%			

Name of bank/building society:

Name(s) of account holder(s):

Bank/building society account number:

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Branch sort code:

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Reference number (if applicable):



**NFU Mutual**

INSURANCE | PENSIONS | INVESTMENTS

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## SECTION 4. DECLARATION/ SIGNATURE

### IMPORTANT NOTES:

Please read our current Key Features Document for general information and minimum fund investment limits. Important information about each fund is contained in the Key Investor Information Document (KIID). You should read the KIID for each fund you have chosen.

### DECLARATION:

- I apply to subscribe to a stocks and shares ISA for the tax year starting 6 April 2023 and every following tax year until further notice.
- I have seen the latest key investor information document for each of the fund(s) I am investing in, together with the supplementary information document.
- I declare that:
  - I am 18 years of age or over;
  - all subscriptions made, and to be made, belong to me;
  - I have not subscribed and will not subscribe more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year;
  - I have not subscribed, and will not subscribe, to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares 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 and 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 NFU Mutual Select Investments Limited 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.
- I authorise NFU Mutual Select Investments Limited:
  - To hold my cash subscription, ISA investment, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
  - 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 instruct NFU Mutual Select Investments Limited to deduct any advice fees, where applicable.
- I understand that such a deduction will be made from the assets NFU Mutual Select Investments Limited holds for me and I accept that this is in accordance with NFU Mutual Select Investments Limited's terms and conditions, this application form, and (where applicable) my NFU Mutual Financial Adviser's terms of business 'Our Advised Service'.
- I declare that, I have taken reasonable care that all statements made by me within this application are true and complete. I understand that it is a serious offence to make false statements and that to do so could lead to prosecution.
- I agree to inform NFU Mutual Select Investments Limited immediately in writing of any change in my circumstances affecting any of the information given on the form.

Full name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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NFU Mutual

NFU Mutual Select Investments Limited (No. 08049488).  
Authorised and regulated by the Financial Conduct Authority. Registered in England.  
Registered office: Tiddington Road, Stratford upon Avon, Warwickshire CV37 7BJ.

To find out more about how we use your personal information and your rights,  
please view the privacy policy on our website.

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[nfumutual.co.uk](https://nfumutual.co.uk)

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