

NFU MUTUAL SELECT INVESTMENTS ISA SINGLE
PAYMENT TOP UP FORM 2025/26 TAX YEAR

If you need to discuss anything whilst completing this form, please ring us on 0800 622323 or email us on 'myinvestments@nfumutual.co.uk'

SECTION 1. PERSONAL DETAILS

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

Full name(s) of owner(s):

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Plan number:

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Address:

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Postcode

Postcode

Contact telephone number:

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Email address:

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National Insurance Number:

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SECTION 2. PAYMENT AND FUND DETAILS

Use this section to tell us how much you want to invest into your plan.

I WOULD LIKE TO MAKE A ONE OFF PAYMENT INTO MY INVESTMENT AS FOLLOWS:

Please note the minimum payment you can make is £1,000 up to a maximum payment amount of £20,000.

Payment amount:

£

This payment amount will be added to your existing fund choice(s). Should you wish to invest in a different fund choice then please contact us before making your payment.

- If you wish to pay by cheque, please make the cheque payable to 'NFU Mutual Select Investments Limited' and also ensure you write your plan number on the back of the cheque. Please then send the cheque to us with this completed form.
- If you wish to send the money to us by way of electronic transfer, please send the funds to the following bank details:

Account name: NFU Mutual Select Investments Limited

Sort code: 20-83-08

Account number: 40132209

Payment reference: Please add your plan number

SECTION 3. YOUR BANK ACCOUNT DETAILS

If you are making payment to us electronically please provide your bank account details that your single payment will be paid from. The details you provide will be used to electronically verify you and the bank account that you will make payment from.

If we cannot do this, we will contact you for more information.

Name of bank/building society:

Name(s) of account holder(s):

Bank/building society
account number:

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Branch sort code:

$$\boxed{} \boxed{} - \boxed{} \boxed{} - \boxed{} \boxed{}$$

Reference number (if applicable):



NFU Mutual
INSURANCE | PENSIONS | INVESTMENTS

NFU MUTUAL SELECT INVESTMENTS ISA SINGLE PAYMENT TOP UP FORM 2025/26 TAX YEAR

SECTION 4. DECLARATION/ SIGNATURE

Completed forms should be sent to:

Financial Services
NFU Mutual
Tiddington Road
Stratford-upon-Avon
Warwickshire
CV37 7BJ

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

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.

If you are currently receiving income payments, these will continue to the same bank account.

DECLARATION:

- I apply to subscribe to a stocks and shares ISA for the tax year starting 6 April 2025 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 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

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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

