

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 by post at 51 Saffron Road, Wigston, LE18 4AG or by taking it into your local HSBC Branch. Alternatively, you (the spouse/civil partner) can provide a verbal declaration over the phone by calling our Bereavement Support Team on 0345 850 0088. Once we receive the completed Declaration, we will 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	
<u>Our Reference</u> (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.

HSBC UK Plc

51 Saffron Road, Wigston, LE18 4AG

Tel: 03457 404 404 Web: www.hsbc.co.uk

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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

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