

# ISA Declaration



**I apply to subscribe for a stocks and shares ISA for the tax year 2023/2024 and each subsequent tax year in which I choose to make a subscription.**

I declare that:

- All subscriptions made, and to be made, belong to me, and that I am 18 years of age or over
- 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
- 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 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 Financial Administration Services 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 Financial Administration Services Limited:

- i. to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- ii. to make on my behalf any claims to relief from tax in respect of ISA investments.

The information that has been given by me is correct to the best of my knowledge, and I will inform Fidelity immediately of any changes.