

For deaths between 3 December 2014 and 5 April 2018, the surviving spouse is entitled to the ISA value as at the date of death.

Please complete this form in blue or black ink, using CAPITAL letters and ticking the appropriate boxes.

Your M&G client reference (current M&G investors)

Date of birth		D	D	M	M	Y	Y	Y	Y
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Phone: Home
Mobile
Work
Email

National Insurance Number

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☐ If you do not have a National Insurance Number please tick

Deceased's existing M&G client reference (if applicable)

Date of birth	D	D	M	M	Y	Y	Y	Y
National Insurance Number (if known)								
Date of death	D	D	M	M	Y	Y	Y	Y
Date of marriage or civil partnership between investor and the deceased	D	D	M	M	Y	Y	Y	Y

At M&G we are committed to protecting your privacy. To learn more about how we process your personal data please refer to our Privacy Notice available at www.mandg.co.uk/privacynotice

4 APS eligibility declaration

This section must be completed to confirm you are eligible to request the calculation and disclosure of the Additional Permitted Subscription (APS) ISA allowance for the above named deceased.

I declare that:

- 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).

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

Signature

Date

D	D	M	M	Y	Y	Y	Y
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