

Triodos Bank. Cash ISA declaration form.

Complete this cash ISA declaration form if you want to pay money into your Triodos cash ISA this tax year. You may only do this providing you have not subscribed to another cash ISA in this tax year. You do not need to fill in a new ISA application form.

This form can be completed by typing in details in the required fields below then printing a copy or by printing a copy and filling in the required details. Then sign and date the form and return it to us with your cheque (if applicable) to our Freepost address:

Freepost TRIODOS BANK

If you wish to make an electronic bank transfer please wait for confirmation that your ISA has been declared.

If you have Internet Banking you can complete a declaration online. Log into your Internet Banking account, click the green 'Go to old Internet Banking' button, and select Account Management and then ISA Declaration Management from the menu.

Please complete in BLOCK CAPITALS.

Triodos cash ISA account number

First name(s)

(please use your full name and not a nickname)

Surname

Permanent residential address

Postcode

Date of birth

/ /

National Insurance Number

Telephone: 0330 355 0355
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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Triodos Bank

Declaration for a Triodos cash ISA for the tax year 2023/24 and each subsequent year until further notice.

I declare that:

- all subscriptions made, and to be made, belong to me
- I am 16 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 cash ISA in the same tax year that I subscribe to this cash 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 Triodos Bank 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 Triodos Bank:

- to hold my cash subscription, ISA investments, 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
- to make any enquiries that you may consider necessary to confirm the details on this form.

I agree to the Triodos cash ISA Terms and Conditions and Triodos Bank's General Terms and Conditions. I acknowledge your right to suspend operations on this account until satisfactory details about my identification have been supplied. I declare that this application form has been completed to the best of my knowledge and belief.

Signature

Date

/ /

TB/ISA.DEC.INT/MAR23