

ISA Declarations

ISA Declaration

I declare that:

- all subscriptions made, and to be made, belong to me;
- 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 a cash ISA and a stocks and shares ISA in the same tax year; and
- 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 Castle Trust 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.

Customer Declaration

I authorise Castle Trust Bank:

- to hold my cash subscriptions and any interest earned on those subscriptions;
- and
- to make on my behalf any claims to relief from tax in respect of ISA investments.