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# ALBERT E SHARP

INVESTMENT MANAGEMENT & STOCKBROKING

## ISA APPLICATION 2023/24

**Full name:**  
**Permanent residential address:**

	<b>Postcode</b>	

**Date of birth:**

**Do you have a National Insurance (NI) Number?**

Tick one box    Yes    No    If yes you must enter it here,

You should be able to find your NI number on a pay slip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

I apply to subscribe for a Stocks and Shares 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 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 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 Platform Securities LLP 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 PLATFORM SECURITIES LLP**

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

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## ISA APPLICATION 2023/24

### ISA Terms and Conditions

Your Albert E Sharp ISA is a Flexible ISA which means that you may withdraw cash from the ISA and replace the cash within the same tax year without the replacement counting towards your annual subscription limit.

Your ISA must be and must remain in the beneficial ownership of you, the investor, and must not be used as security for a loan

Investments and share certificates or other documents evidencing title will be held in the name of a nominee company controlled by us or in the name of a third party custodian selected by us in accordance with the FCA rules.

We will arrange, if you elect, for you to receive a copy the annual report and accounts issued by every company or other concern in respect of shares, securities or units issued by every company or other concern in respect of shares, securities or units which are held directly in the ISA

We will arrange, if you elect, for you to be able to:

- Attend shareholders' securities holders' or unit holders' meetings
- Vote
- Receive, in addition to the annual report and accounts, any other information issued to shareholders, securities holders or unit holders

If we delegate any of the functions or responsibilities under these terms we will ensure that the designated person is competent to carry out those functions and responsibilities

We will notify you, if by reason of any failure to satisfy the provisions of the ISA regulations an ISA has, or will, become void

On your instruction and within the time stipulated by you (minimum 30 days) we will transfer your ISA or part of your ISA to another ISA plan manager

On your instructions and within the time stipulated by you (minimum 30 days) we will withdraw the investments and proceeds of all or part of your ISA to yourself.

Please note that subscriptions made in the current tax year must be transferred in full.

**I agree to the ISA terms and conditions**

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

**Signed .....**      **Date.....**