Cash ISA Additional Investment Form

Clydesdale Bank

Only to be used with an existing ISA invested within the current tax year or the previous tax year. Please complete this form.
Please note this form will be returned if any section is incomplete or incorrect.

Customer number (if known)

Please confirm the source of your Additional Investment Form in the boxes shown ☐ Internet ☐ Telephone

1. Personal Details

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Dr Other

First name(s) (in full)

Surname

Permanent residential address

Post code

Telephone number (daytime)

Telephone number (evening)

Date of birth (mandatory)

2. Do You Have a National Insurance Number?

You should be able to find your National Insurance Number on a payslip, form P45 or P60, a letter from HM Revenue & Customs or a pension order book.

☐ Yes – Please enter here

☐ No – Please explain why

3. Application Details

By completing this form you confirm that you wish to subscribe to a Cash ISA for the first tax year 2008/2009, and each subsequent year until further notice.

(i) Lump Sum Subscriptions

Please enter the amount you would like to subscribe in the box below.
The minimum lump sum is £10, and for the tax year, the maximum that can be invested into a Cash ISA is £3,600 including any regular savings you may make.

Amount £

Sort code

Cheque number

Account number

Name of account holder

Please make cheques payable to Clydesdale Bank PLC.

(ii) Regular Savings

Please enter the existing amount and the new amount you would like to subscribe in the box below.
The minimum monthly payment is £10, and for the tax year the maximum that can be invested into a Cash ISA is £3,600 including any regular savings you may make.

Existing monthly amount £

New monthly amount £

If there is no existing Direct Debit in place please ensure a Direct Debit instruction is completed and attached to this form.

Please enter the day of each month (01-31) the Direct Debit is to be collected from your account.

4. Customer Declaration

This section must be completed.

I declare that the information completed in this application is correct to the best of my knowledge and belief. I understand this application is to increase my current years ISA subscription and is subject to acceptance by MLC. I confirm that I have not, and will not subscribe to more than one ISA of the same type this tax year and will not invest more than the limits allowed, as detailed in Section 3. I understand that the existing terms and conditions of my current ISA (a copy of which I have already received) continue to apply to this additional investment.

Signed

Date

MLC is a trading name of MLC Savings Limited registered in England (No. 3663932). Registered Office; 88 Wood Street, London, EC2V 7QQ.
Clydesdale Bank PLC is Registered in Scotland (No. SC001111). Registered Office; 30 St Vincent Place, Glasgow G1 2HL.
MLC Savings Limited and Clydesdale Bank PLC are authorised and regulated by the Financial Services Authority, register numbers 191235 and 121873, and are members of the National Australia Bank Group of Companies.

If you would like assistance in completing this form call 0870 6073344. Calls may be recorded or monitored for staff training and security purposes.