

Trading ISA SAYE Instruction

- In order to comply with H.M. Revenue & Customs guidelines we require you to sign and send this form back to us within 90 days from exercise or maturity
- Please ensure you have completed the CREST Transfer Form and attach it to your share certificate(s).

1 Your Personal Details

This information is necessary to fully activate your account.

Customer name:

Customer Trading ISA Number:

National Insurance Number:

2 Subscription Details

How much would you like to subscribe?

Stock name

What to do next:

Please send in your:

- Valid Share Certificate(s)
- Signed CREST Transfer Form – these are available to download at tdwaterhouse.co.uk/youraccount/transfer-paper.cfm

And one of the following:

- Notice of Exercise
- Letter of Appropriation (issued by Company or Registrar)

What happens next?

When we receive your completed SAYE Instruction Form, we will endeavour to carry out your instructions within 48 hours. All documents must be received in our offices within 90 days of Exercise. We will confirm to you in writing once the transfer has been completed.

3 Signature

I confirm that I wish you to carry out the Save As You Earn scheme transfer listed above to fund my current tax year ISA.

X _____

Date

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