



## Account Administration

You will receive your account administration messages electronically. If you prefer paper copies please tick this box.

If you would like to receive news and email information on other products and services offered by TD Waterhouse or other members of its Group of companies by email or SMS please tick this box.  You may unsubscribe from this service at anytime by contacting us on 0845 607 6001.

## 3 Employment status (please tick as appropriate)

- Full time employment       Self employed       Homemaker       Student  
 Part time employment       Retired       Unemployed       Armed Forces

Employer's name

Employer's address

Postcode

No. of years in current employment

YY / MM

Do you have a National Insurance No?

Yes  No

National Insurance No.

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## 4 Subscription

Please specify your preferred funding option from the list below. Your welcome pack will then provide more details on your chosen options.

**Please note the minimum initial subscription is £100.00**

- BED & ISA stock subscription       Cash Transfer from another TD Waterhouse account  
 Transfer from an existing ISA held with another provider (inc. Cash ISA)       Transfer from a Save As You Earn scheme  
 Cheque payment

I enclose a cheque for £

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Please make your cheque payable to TD Waterhouse.

## 5 Declaration (please read and sign this section)

**To open an ISA the applicant must read and complete the relevant sections below. Before signing the declaration you should ensure that you have read and understood the TD Waterhouse Customer Terms of Service included with this application form.**

- I confirm that I have read and understood the TD Waterhouse Customer Terms of Service, including the ISA Supplemental Terms of Service, and agree to be bound by their terms.
- I confirm that I have read and consent to the use of my personal information as set out in clause 20 of the TD Waterhouse Customer Terms of Service.
- I understand that by submitting this form, I am indicating my consent to receiving marketing information as set out in clause 20.2 of the TD Waterhouse Customer Terms of Service unless I have indicated an objection to receiving such information by ticking the following box .
- I confirm that I am 18 years of age or over.
- I will undertake to notify you promptly of any changes to the details supplied.
- I confirm that this account is not to be used for or on behalf of anyone other than the applicant, without disclosure to TD Waterhouse.
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings and 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 TD Waterhouse if I cease to be so resident and ordinarily resident or to perform such duties or be married to or in a civil partnership with a person who performs such duties.
- All subscriptions made, and to be made, belong to me.
- I have not subscribed and will not subscribe more than the overall subscription limit to a Cash ISA and a Stocks & Shares ISA in the same tax year.
- I have not subscribed and will not subscribe to another Stocks & Shares ISA in the same tax year that I subscribe to this Stocks & Shares ISA.

**I authorise TD Waterhouse Investor Services (Europe) Ltd:**

- 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.

**I declare that the information in this form is true and correct to the best of my knowledge and belief.**

Signature

X

Date

D	D	M	M	Y	Y	Y	Y
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