

# Lifetime ISA Declaration

This is a copy of the declaration you received when you applied for your Lifetime ISA. Please keep it for your records.

## I declare that:

- All subscriptions made, and to be made, belong to me.
- Either:
  - I am 18 years of age or over, and under the age of 40, **or**
  - the account is being opened to receive investments from another Lifetime ISA, a defaulted Lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase
- I have not subscribed and will not subscribe more than the overall subscription limit in total to a Cash ISA, a Stocks and Shares ISA, an Innovative Finance ISA or a Lifetime ISA in the same tax year.
- I have not made current year payments, and will not make current year payments, that exceed the Lifetime ISA payment limit.
- I have not subscribed and will not subscribe to another Lifetime ISA in the same tax year that I subscribe to this Lifetime ISA.
- I have not made current year payments, or transfers from a Help to Buy: ISA, and will not make current year payments, or transfers from a Help to Buy: ISA, to another Lifetime ISA in the same tax year that I subscribe to this Lifetime ISA.
- I agree to the Lifetime ISA terms and conditions.
- (Other than for accounts opened to receive investments from another Lifetime ISA, a defaulted Lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase) 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 Bath Building Society 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 Bath Building Society:**

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds (including any Lifetime ISA government bonus) 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.
- to submit Lifetime ISA bonus claims to HMRC on my behalf.
- to withhold and deduct from a balance in the Lifetime ISA and to pay to HMRC any charges due on withdrawals.
- to make a record in writing in accordance with Regulation 12B paragraph 7(a) of the Individual Savings Account Regulations where required to do so.

I agree to be bound by the Rules of the Society and the terms of the account including the Terms and Conditions and the **Agreement to Assign Windfalls to Charities**. A copy of the Rules is available from Head Office and our Branches. I declare that the money being saved is my own and will not be held by me as a trustee for a body corporate, or persons who include a body corporate.

I declare that the information given is correct to the best of my knowledge and belief.

If you have not applied for a Lifetime ISA with Bath Building Society, please contact us immediately by emailing us at [savings@bibs.co.uk](mailto:savings@bibs.co.uk) or call us on 01225 423271.



Protected