Lifetime ISA

Home Purchase Progress

Bath Building Society
We're different because you are

This form should be completed to update Bath Building Society on the progress of your client's house purchase.

Please complete Section 1 and then the relevant section relating to the customer's circumstances.

This form can be returned to us by post (Bath Building Society, 15 Queen Square, Bath BA1 2HN), or by email at **savings@bibs.co.uk**

Section 1: Customer and conveyancer details

Conveyancer firm

Conveyancer name

Conveyancer email

Customer full name

Customer date of birth

Customer National Insurance number

Lifetime ISA number

Section 2: Completion (return form within 10 working days of completion)

Please complete this section when the purchase has been completed.

Previous address (including postcode)

Property address (including postcode)

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I confirm completion took place on:

Purchase price £

Section 3: Completion is not expected within 90 days of the withdrawal

New date of expected completion if known:

Has a 60-day extension already been granted? ☐ Yes ☐ No

If no, you will be granted a 60-day extension upon acceptance of this request.

If yes, you will be granted an additional 30 days upon acceptance of this request.

We'll let you know if your request has been accepted within five working days.

Section 4: Purchase has fallen through

Date purchase fell through

Amount to be returned £

Please be aware that if the amount you are returning is less than the amount originally withdrawn from the Lifetime ISA the customer will be subject to a 25% government withdrawal charge on the shortfall.

We'll notify you once we've updated our systems. Once we've done this you will need to return the funds electronically to the following details, please note we cannot accept cheques.

Sort code: 60-02-05
Account number: 50827545

Reference number: Please use the 8 digit Lifetime ISA account number

Please do not return the funds until we have notified you that we have updated our system as your payment will be rejected.

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Bath Investment & Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority, Registration Number 206026.