

Reactivate your existing Kingston Unity ISA

Thank you for requesting to reactivate your ISA. Please find attached an application to subscribe, this form can be used to open a new ISA, transfer an ISA to us or reactivate your existing Kingston Unity ISA.

Under HMRC rules, if at the end of the tax year you have not paid any money towards your annual ISA allowance, your account will become inactive. Should you wish to make further investments into your ISA, you will need to reactivate your account by completing the enclosed 'Application to Subscribe' form.

On the form you will need to complete the following sections:

- **Section 1** - Your details
- **Section 2a** - Select 'Reactivate my existing KU ISA'
- **Section 2b** - Tell us which account you wish to reactivate
- **Section 3 & 4** - Making additional payments

You will need to make a payment to reactivate your account. The current tax-free ISA allowance means that you can put a total of £20,000 into an ISA. This is the total amount you can invest across all types of ISAs. So, if you have already saved in a Cash ISA, Innovative Finance ISA or Lifetime ISA this year, this will reduce the amount you can invest into your Kingston Unity Stocks & Shares ISA. You can only pay into one Stocks & Shares ISA each tax year.

- **Section 5:** Keeping you informed
- **Section 6:** Declaration

Please send the completed form back to us using our freepost address:

Freepost **KINGSTON UNITY**

If you have any questions you can email us at enquiries@kingstonunity.co.uk or call us on 01924 240164 and we will be happy to help.

Kingston Unity is a Friendly Society. We're totally different to banks, because we're owned by our Members. We're run for the benefit of you, and your family, not for shareholder profit.

We've helped hundreds of thousands of Members, their children and grandchildren, to make more of their money with tax-efficient savings and investments. We've been looking after our Members' money and best interests since 1840.

We're financial friends for life.

Our promise to you

- We will treat you as a 'retail customer' which means that you will receive the highest level of customer protection available under UK financial services rules and regulations. You will be treated fairly in all of your dealings with Kingston Unity including:
- The product and associated services will be clearly described, so that you can decide whether it meets your needs
- Being provided with clear and accurate information, during and after the point of sale
- Our dealing effectively with your queries and complaints. See Key Information Document for our complaints procedure.

Your obligation

- To complete the application to the best of your knowledge and inform Kingston Unity in writing immediately of any changes in your circumstances
- To read and understand the Product Guide, Key Information Document and Terms & Conditions of this product before making an application to subscribe
- To read all documentation that we send to you.

Application checklist

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- Section 1**
Complete this section with your name and contact details. You will also need your National Insurance number, which can be found on a payslip, P45/P60 form a pension order book or tax return.
- Section 2a**
Select if you are reactivating to pay into an existing KU ISA (where you have not used your ISA allowance for a complete tax year), transferring an ISA from another provider to us or opening a new Investment ISA with Kingston Unity.
- Section 2b**
If you are reactivating an exiting KU ISA then enter your account number here.
- Section 2c**
If you are transferring an ISA from another provider to us then complete this section. We will use this information to contact your existing ISA provider to arrange the transfer to us. Please sign and date to confirm you wish to transfer your existing ISA to Kingston Unity.

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- Section 3 & 4**
If you would like to make additional contributions into this Stocks & Shares ISA the you will need to complete this section. For new accounts we will need to take a payment to open the account.

This can either be a regular Direct Debit from £25 per month or £300 a year. You can also make a lump sum payment by cheque or bank transfer. The initial minimum lump sum amount is £500 to open the account and £50 thereafter.

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- Section 5**
This section describes how and in what circumstances we will use the personal information you give to us. It also gives you the opportunity to tell us whether or not you would like to receive newsletters and information about our other products and services, and to indicate your communication preferences if so.
- Section 6**
Please read the declaration in full and once you have completed the application form, sign and date it in the space provided.
- Section 7**
If someone has recommended you or if you have a promotional code then you can add it here and let us know how you heard about us.

What to do next

If you have read all the information and are ready to apply, simply complete this form and return to:
Freepost KINGSTON UNITY

If you have any questions whilst completing this form you can contact us on:

☎ 01924 240 164
✉ enquiries@kingstonunity.co.uk
🌐 kingstonunity.co.uk/isa

Please complete this form in BLOCK CAPITALS using black ink. You can use this application to open a new Investment ISA, transfer an ISA from another provider or reactivate an existing Kingston Unity ISA. Please read the checklist on the previous page before completing this application to subscribe, if you would like any help you can contact us on 01924 240 164.

1. I apply to open a Stocks & Shares ISA:

Title	First name	Last name
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth <i>dd/mm/yy</i>
NI number [†]		
Current address		
		Post code
Previous address*		
		Previous post code
How long did you live at this address?	From <i>dd/mm/yy</i>	To <i>dd/mm/yy</i>
Telephone	Email	

[†]National Insurance number.

*Required if you have lived at your current address less than 3 years.

2. Your ISA Application

2a. I would like to apply to...

<input type="checkbox"/> Reactivate my existing KU ISA <i>(Complete section 2b)</i>	or	<input type="checkbox"/> Transfer an ISA from another provider <i>(Complete section 2c)</i>	or	<input type="checkbox"/> Open a new ISA <i>(Continue to section 3 on the next page)</i>
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2b. Reactivate my existing Kingston Unity ISA

Under HMRC rules, if at the end of the tax year you have not paid any money towards your annual ISA allowance, your account will become inactive. Should you wish to make further investments into your existing Kingston Unity ISA, you will need to complete this form to reactivate your account. Please note, you can only pay into one Stocks & Shares ISA each tax year.

Existing KU ISA account number	<i>(Continue to section 3 on the next page)</i>
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2c. Transferring an ISA from another provider

ISA provider's name	ISA account number
ISA provider's address	
Post code	
Type of ISA	<input type="checkbox"/> Cash ISA <i>Please continue to question below.</i> <input type="checkbox"/> Stocks & Shares ISA <i>Please continue to question below.</i>
Do you want to make a full or partial transfer?	<input type="checkbox"/> Full <input type="checkbox"/> Partial
If partial how much?	£
Does this include current tax year?	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>If you are transferring the current tax year, you must transfer the whole amount.</i>
Are you transferring into an existing or new Kingston Unity ISA?	<input type="checkbox"/> New <input type="checkbox"/> Existing - add your existing KU ISA account number

I wish to transfer the ISA that I hold with the above ISA Manager and I instruct my existing ISA Manager to transfer as indicated to Kingston Unity Friendly Society.

Sign Here 

Date <i>dd/mm/yy</i>

3. Making additional payments

For new applications we will need to take a payment to open the account. For an inactive ISA, you will need to make a payment to reactivate your account. You can make a lump sum payment by bank transfer or by cheque and/or you can set up a regular Direct Debit. Payments are subject to the overall maximum allowed by the Government. Current limits can be found on our website kingstonunity.co.uk/isa.

3a. Lump Sum payment

If you would like to make an initial lump sum payment, choose whether you would like to pay by bank transfer or by cheque:

Would you like to pay by bank transfer or by cheque? cheque bank transfer

Initial lump sum investment amount? £ *minimum initial lump sum amount is £500

Bank Transfer: Account name: Kingston Unity Sort Code: 60-60-05 Account: 4 5 9 4 1 0 8 4 Please use your name as a reference.

Cheque: Please make your cheque payable to Kingston Unity 'your full name'

3b. Regular Direct Debit

If you would like to set up a regular Direct Debit payment choose if you would like to pay monthly/yearly and how much you would like to pay:

<input type="checkbox"/> Monthly Collection date <input type="checkbox"/> 1st <input type="checkbox"/> 16th <i>Choose one</i> <input type="checkbox"/> £25 <input type="checkbox"/> £30 <input type="checkbox"/> £40 <input type="checkbox"/> £50 <input type="checkbox"/> £100 Other £ <input type="text"/> *minimum monthly Direct Debit is £25	or	<input type="checkbox"/> Yearly Collection date <input type="checkbox"/> 1st <input type="checkbox"/> 16th <i>Choose one</i> <input type="checkbox"/> £300 <input type="checkbox"/> £500 <input type="checkbox"/> £600 <input type="checkbox"/> £800 <input type="checkbox"/> £1,000 Other £ <input type="text"/> *minimum yearly Direct Debit is £300
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4. Instruction to your bank or building society to pay by Direct Debit



Instruction to your Bank or Building Society to pay by Direct Debit



Please fill in the whole form using a ball point pen and send it to:

Applications, Kingston Unity Friendly Society Limited
 9 Navigation Court, Calder Park Wakefield WF2 7BJ

Name and full postal address of your Bank or Building Society

To: The Manager Bank/building society

Address

Postcode

Name(s) of Account Holder(s)

Bank/Building Society account number

Branch Sort Code

Service user number

2 7 4 3 8 4

Reference

Instruction to your Bank or Building Society

Please pay Kingston Unity Friendly Society Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Kingston Unity Friendly Society Limited and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)

Date

Banks and Building Societies may not accept Direct Debit Instructions for some types of account. This guarantee should be detached and retained by the payer.



The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Kingston Unity Friendly Society Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Kingston Unity Friendly Society Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Kingston Unity Friendly Society Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
- If you receive a refund you are not entitled to, you must pay it back when Kingston Unity Friendly Society Limited asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

5. How your information will be used

We will use your personal information to administer your account, including collecting payments, managing claims and withdrawals and providing regular statements. We will also use your personal information to confirm that you are eligible for the relevant product and to verify your identity. We will only use that information for this specific purpose.

If you register an interest in an event, promotion or product for yourself we will use the personal information you give us to get in touch with you about it according to your indicated communication preferences.

We may share the personal information you give us with our service providers to conduct our business efficiently and effectively.

Information about you in relation to our processing of your personal data are set out in our 'Privacy Notice'. You can also find out more information about how, what, when and why we process such personal information in this notice. We take your privacy very seriously and we think you should too so please take a moment to read this notice in full.

5a. Keeping you informed

Kingston Unity would like to keep you informed of other products and services we offer which we feel may be of interest to you. We will never sell or licence your personal information to a third party. You can easily "opt out" of receiving such information at any time by contacting us.

Would you like to receive Member emails?

Our Member emails includes Society news, financial and lifestyle articles and information about community events. If you would like to receive these updates by email please tick the box below:

Yes, send me Member emails

Would you like to receive information and offers about our products & services?

If you would like to hear about latest offers and information about our products and services please tick the appropriate boxes:

Email Post Phone Text Message

6. Declaration - please ensure you sign and date this section

6a. I declare that:

- I am 18 years of age or over
- I am a resident in the UK, a UK Crown servant, a dependant of a UK Crown servant or married to/in a civil partnership with a UK Crown servant
- All subscriptions made, and to be made belong to me
- 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. (These can be disregarded where the Stocks & Shares ISA is being transferred to us)
- I have not subscribed and will not subscribe more than the overall subscription limit in total to a Cash ISA and a Stocks & Shares ISA in the same tax year.

6b. I authorise Kingston Unity Friendly Society Limited:

- To hold my subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- To make on my behalf any claims to relief from tax in respect of ISA investments.

6c. I agree to inform Kingston Unity in writing immediately of any changes in my details.

6d. I have read and understand the Product Guide, Key Information Document and Terms & Conditions of this product.

- I declare that this application has been completed to the best of my knowledge and belief.

Sign Here



Date dd/mm/yy

7. Further information

Promo code

How did you hear about us?

Find out more at enquiries@kingstonunity.co.uk 01924 240 164 kingstonunity.co.uk/isa