

Income Bonds application



It's easier and faster to apply online,
simply scan this QR code or go to
nsandi.com/IBSF

**NS
&I**

➤ Please complete this form if you're over 16 and want to invest in an NS&I Income Bonds account in your own name or jointly with one other person aged over 16.

➤ Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster.

➤ **Already have an Income Bonds account?**

If you want to deposit more money into your Income Bonds account, please use the simpler Income Bonds deposit form. You can download it from nsandi.com/forms or call us and we'll send you one.

1 Your initial deposit

amount £ p minimum £500, maximum £1 million per person

application reference
number

You can pay it by cheque or by switching from another NS&I account (see section 2). If paying by cheque, write the application reference number on the back.

2a Paying by cheque

Give details of the
account on which your
cheque is drawn.

name of
account holder

account number

sort code

 - -

2b OR by switching from another NS&I account

type of NS&I
account switching from
account number or
holder's number

The NS&I account you switch from must be in your name or the name of the second investor, if applicable. If you switch from a fixed term investment that's not on sale, you won't be able to switch back. Any amount you take out from a Direct ISA may not be able to be paid back in during this tax year.

If you want to switch from a fixed term investment, there are some restrictions. Please check the customer agreement (terms and conditions) for the investment you're switching from before you apply.

If you are switching from a fixed term investment, do you want to defer until it matures? (You can only defer within 30 days before the maturity date.)

yes ☒ no ☒ **A penalty may apply if you cash in all or part of a fixed term investment before its maturity date.**

If you want to close the account you are switching from, mark here ☒

If you choose to close it, we'll automatically repay any remaining balance after the switch to your nominated bank or building society account on our records. Or, if we don't hold this, by warrant sent to your address.

If the amount you are
switching will take the
balance on your account
below the minimum allowed,
you must mark that you want
to close the account.

3 Your details

title

date of birth
(this is essential)

Please complete in full.

surname

forenames
in full

address

postcode

country of
residence

nationality

phone number

Preferably a mobile so we can reach you more easily.

email address

If you are resident for tax
purposes in more than
one country or territory
outside the UK, please
give the tax country
and tax identification
number for each of the
others on a separate
sheet of paper.

If you're resident for tax purposes in any country or territory outside the UK, please complete the fields below.

city of birth

country of birth

tax country

tax identification
number

Please complete in full.

If the second investor is resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

title									date of birth (this is essential)		D	D	M	M	Y	Y	Y	Y
surname																		
forenames in full																		
address																		
postcode									country of residence									
nationality																		
phone number															Preferably a mobile so we can reach them more easily.			
If the second investor is resident for tax purposes in any country or territory outside the UK, please complete the fields below.																		
city of birth																		
country of birth																		
tax country																		
tax identification number																		

All income and any withdrawals will be paid directly into this account. It must be a personal account in your name or the name of the second investor, held in the UK, which is able to receive payments by electronic transfer.

If it's an NS&I Direct Saver, just write 'NS&I' in the 'bank/building society' field, complete the 'name in which account is held' field and write the account number in the 'bank reference or building society roll no' field.

[illegible]

Please be careful when providing your bank details. If you enter the wrong details any payments you make might be delayed, or credited to the wrong account, and may result in a financial loss.

For joint accounts both you and the second investor must sign.

Declaration:

I/We have had the opportunity to read the customer agreement (terms and conditions) dated **28 February 2022**.

first investor	<div></div>	date	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
second investor (if applicable)	<div></div>	date	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>

Your marketing preferences

We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

first investor by post ☐ by phone ☐ by email ☐ online ☐

second investor (if applicable) by post ☐ by phone ☐ by email ☐ online ☐

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

- Remember to sign and date your form, then send it to:
NS&I, Sunderland SR43 2SB

If paying by cheque make it payable to 'NS&I'.