



If you have any questions,
please call us on

08000 326 323

Select Stocks and Shares ISA

Application form 2008/09

You can also apply for a Select ISA online at www.alliancetrust.co.uk/online

Alliance Trust
use only

Please complete in block capitals and black ink

This application will be effective for the tax year in which you apply, and each subsequent year that you make payments to the Select Stocks and Shares ISA until further notice.

Please note you may not subscribe to more than one Stocks and Shares ISA in the same tax year.

1 Personal details



If you are an Alliance Trust customer please provide your Customer Reference Number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Title

Date of birth

<input type="text"/>	DD	<input type="text"/>	MM	<input type="text"/>	<input type="text"/>	YYYY
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Surname

National Insurance number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Forename(s)

ISA regulations require that if you have a National Insurance Number you must provide it.

Permanent residential address

Mailing address (if different)

Postcode

Postcode

Phone number

Mother's maiden name (for security purposes)

Email address

2 Cooling off period



Was this product recommended to you by a professional adviser? Yes

No

If this product was recommended to you by a professional adviser you will have seven days to withdraw your application before we open your ISA. To exercise these rights, please use the Withdrawal Notice provided. No investment purchases will be made by us until the end of the cooling off notice, if it is applicable to you.

 This literature is printed on paper made from trees grown in sustainably managed forests.

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For security and compliance monitoring purposes telephone calls may be recorded.

Alliance Trust Savings Limited is registered in Scotland No. SC98767, registered office as stated above; is authorised and regulated by the Financial Services Authority whose address is 25 The North Colonnade, Canary Wharf, London E14 5HS firm reference number 116115; gives no financial or investment advice.

3 Disclosure



If you wish us to disclose information about any Plans you hold with us to a third party, please give details in this section.

Name	<input type="text"/>	Please send duplicate statements to the person named please tick	<input type="checkbox"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/>		
Postcode	<input type="text"/>	Please state the relationship to you	<input type="text"/>

We will only respond to information requests from this person.

If instructions are to be accepted from anyone other than you, a power of attorney, or letter of authority acceptable to us, must be submitted. Please contact us on 08000 326 323 for a Third Party Authority form.

4 Funding your ISA



Please remember that the maximum you can subscribe to an ISA in any tax year is £7,200. You can invest some or all of this amount in a Stocks and Shares ISA.

You may fund your ISA in the following ways:

- Single lump sum payments.
- Regular Direct Debits.
- Transferring in another ISA.
- Share exchange or the transfer in of employee shares.

Single lump sum payments

How much do you wish to pay?	<input type="text"/>	£	(minimum £50)
By cheque	Please make cheques payable to Alliance Trust Savings Limited		
Tick to confirm you have enclosed your cheque	<input type="checkbox"/>		

Regular payments by Direct Debit

How much do you wish to pay?	<input type="text"/>	£	(minimum £50)
Please give the amount of your regular payment			
On which day of the month?	1st <input type="checkbox"/>	8th <input type="checkbox"/>	Commencing in
(Or next business day)	15th <input type="checkbox"/>	22nd <input type="checkbox"/>	(month/year)
			<input type="text"/>
			<input type="text"/>
Collection	Direct Debits will be automatically collected on a monthly basis.		<input type="checkbox"/>
	If you wish Direct Debits to be collected quarterly, please tick.		

You must complete a Direct Debit instruction before we can take payments as instructed.

Transferring in another ISA

I wish to open my ISA by transferring in another ISA (please tick)	<input type="checkbox"/>	We will not process any transfers unless you enclose the necessary Transfer Request Forms. Please tick to confirm that you have enclosed them.	<input type="checkbox"/>
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You are not required to complete sections 5 and 6. Please now ensure you read the declaration and sign Section 8.

Share exchange or the transfer of employee shares

If you wish to use either of these facilities please contact us or visit www.alliancetrust.co.uk/forms for the appropriate documentation.

