

# LV= ISA

## Subscription Gifting Form (For the tax year 2024/2025)

### You can use this form:

- Once an application to open a new or top up an existing LV= ISA has been submitted with an ISA subscription for the current tax year. The subscription payable is being gifted to the ISA applicant by a third party.

### Important information

Please return this completed form to: LV=, PO BOX 342, Wymondham, NR18 8HS

If you have any queries or you'd like help completing your instruction, please talk to your Financial Adviser or you can call us on **0800 681 6292**, between 9am - 5pm Monday to Friday.

- The amount gifted should be the amount to be invested in the ISA and exclude any adviser charge.
- The donor's details must match exactly the bank account details from which payment is being made.
- LV= will treat the donor as if the donor is making the application directly. Accordingly, to meet its obligations, LV= are required to verify the identity and address of the donor.
- The required verification may be undertaken by the introducing intermediary by completing a Certificate of Verification of Identity or by submitting original or certified evidence of identity and address.
- LV= reserves the right to request any additional information considered appropriate for the effective discharge of all applicable obligations under the regulatory system.

Full name of the person gifting the money (the 'donor')

Full address of the person gifting the money

Postcode

Date of birth of the person gifting the money   /   /     (DD/MM/YYYY)

Relationship to the investor

Single Investment amount

Full name of the ISA policy holder being gifted the money

Quote reference RAQ

### Donor Declaration

I hereby confirm that the details above are complete and correct to the best of my knowledge and belief. I further confirm that the monies subscribed herewith are a gift to the individual named in this application.

Donor Signature

Date

Find out how we use your personal information and what rights you have by visiting [LV.com/dataprotection](https://www.lv.com/dataprotection). This page includes who we are, how long we hold your information, what we do with it and who we share it with. Please tell us if you want us to send you a copy, or have any questions.

If you'd like us to send you this document or any future correspondence in another format, such as Braille or large print, please just let us know.

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