

AiM IHT Service

ISA APPLICATION FORM



ISA Application Form

Please note this Application Form contains interactive boxes, to help you fill in the form online. You have the choice of either filling in this Application Form online or on hard copy. In order to use this functionality please download and open the form in the latest version of Adobe Acrobat. You must print and sign a hard copy of this Application Form.

This form is for an investment in Stellar AiM IHT Service when subscribing for both a new ISA portfolio or topping up an existing portfolio. By completing this form you agree to the terms set out in the Stellar AiM IHT Service Brochure and dated April 2026 as amended from time to time.

You must also complete an Application Form for the Stellar AiM IHT Service.

Definitions

Stellar Asset Management Limited - Investment Manager

Third Platform Services Limited - ISA Manager (Z1888) and Custodian

Applicant personal details

*Please complete if you already have an ISA account with us

Are you eligible for a National Insurance (NI) number? If Yes, you must apply for a NI number and provide it before you complete your ISA application.

Yes

No

You must provide a NI number to apply for an ISA unless you are not eligible for one. You can check if you're eligible and apply online at www.gov.uk/apply-national-insurance-number

You can find your NI number: online through your personal tax account, in the HMRC app, or in any documents you already have, for example, a payslip, P45 or P60, or at www.gov.uk/find-national-insurance-number.

ISA subscription

New Subscription

I wish to open a new Stocks and Shares ISA using my 2026/27 tax year ISA allowance and invest £

For your own benefit and protection, you should read the Terms and Conditions of the ISA Manager (the 'Terms and Conditions') which will form part of your agreement with us, which can be found at <https://thirdfin.com/stocks-and-shares-isa-terms-and-conditions>.

The ISA Manager takes the privacy and security of your personal information very seriously. The information you (or a third party) provide to them will be processed in accordance with their Privacy Notice which you can access at <https://thirdfin.com/privacy-notice>.

ISA declaration

I declare to the ISA Manager, that:

- i) All subscriptions made, and to be made, belong to me;
- ii) I am 18 years of age or over;
- iii) I have not subscribed, and will not subscribe, more than the overall subscription limit total in the same tax year;
- iv) I am resident in the United Kingdom for tax purposes or, if not resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown Employees Serving Overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform the ISA Manager if I cease to be resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties;
- v) For my own benefit and protection I have been given the opportunity to read the ISA Manager's Terms and Conditions carefully and have had any questions I had concerning them answered to my satisfaction; and
- vi) I have read and agree to the ISA Manager's Terms and Conditions.

I hereby authorise the ISA Manager:

- i) To hold my cash subscription and ISA investments, in respect of the interest, dividends and any other rights or proceeds and to claim any relief from tax on my behalf; and
- ii) To give effect to my instructions in accordance with the ISA Manager's Terms and Conditions.

I declare that this application form has been completed to the best of my knowledge and belief. I will notify the ISA Manager, without delay, of changes to these particulars.

I have read and agreed to the declaration above.

Signature of applicant (or power of attorney)

Date

Get in touch

We're here to help

Investors

We recommend you speak to a Financial Adviser in the first instance, as we cannot offer investment or tax advice.

If you have any other questions please contact us on 020 3195 3500 or email us at enquiries@stellar-am.com

For further information, please visit www.stellar-am.com

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