SBI UK

Cash ISA Application Form

2026/2027

Please fill in the form using BLOCK CAPITALS and black ink. Tick any boxes which apply.

Existing Customer: Yes ☐ If Yes, please enter your Account Number .....

No ☐ If No, please complete a new account opening form for a new Savings or Current Account.

Fixed Deposit Cash ISA: **Period of deposit** _____ Rate of Interest _____ %

Complete interest to be paid upon maturity only

State Bank of India are unable to provide any tax advice. If you are unsure about your tax liabilities, you should seek guidance from an independent tax advisor

Current year Subscription Amount with SBI UK £ _____

Transfer-in: Yes ☐ No ☐ If Yes, please fill Transfer Authority Application form

1. Personal Details

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other _____

First name _____ Middle name _____

Surname _____ Date of birth D D M M Y Y Y Y

Are you resident in the United Kingdom? Yes ☐ No ☐

Do you have a National Insurance (NI) Number? Yes ☐ No ☐

If you only have temporary National Insurance Number, please tick 'No'

If Yes, please enter it

☐☐☐☐☐☐☐☐☐

You should be able to see your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

2. Contact Detail

Current Permanent Residential Address

_____

Post Code ☐☐☐☐☐☐☐☐

Home Phone Number _____ Mobile Number ☐☐☐☐☐☐☐☐☐☐☐

Email Address _____

3. Funding

Please debit my SBI UK saving/current account no. ☐☐☐☐☐☐☐☐☐

and transfer an amount of GBP _____ to a Cash ISA Fixed Deposit Account.

4. Declarations

I apply to subscribe for a Cash ISA for the tax year ***2026/ 2027*** and each subsequent year until further notice (this is an option and not an obligation).

I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed and will not subscribe more than the overall subscription limit in total to a Cash ISA and Stocks and Shares ISA in the same tax year;
- I have not subscribed and will not subscribe to another Cash ISA in the same tax year that I subscribe to this Cash ISA, and
- I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & 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 State Bank of India (UK) Limited if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties;
- I confirm that the information I have provided is true to the best of my knowledge;
- I agree to the ISA terms and conditions and the Fixed Deposit terms and conditions, copies of which I have received.

I understand that the State Bank of India (UK) Limited will process personal data supplied by me in relation to this Cash ISA in accordance with the General Data Protection Regulation and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time. The personal data supplied will be processed solely for the purpose of assessing this application and at all times in accordance with the State Bank of India (UK) Limited's Privacy Policy, a copy of which can be found here: https://sbiuk.statebank/privacy-policy

I authorise State Bank of India (UK) Limited

- to hold my cash subscription and any interest earned on those subscriptions;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

Signature

Date...../...../.....

State Bank of India (UK) Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register number: 757156). SBI (UK) Ltd is registered in England and Wales (Registered no: 10436460), with a registered office at Hygeia House 3rd Floor, 66 College Road, Harrow, HA1 1BE. Your eligible deposits with State Bank of India (UK) Limited are protected up to a total of £120,000 by the Financial Services Compensation Scheme, the UK's deposit protection scheme. For further information please visit www.fscs.org.uk. Terms & Conditions Apply. For more information or clarification, visit us at our website https://sbiuk.statebank/ or visit your local branch. The contact centre (0800 532 532) is open 24/7.

SBI UK

Cash ISA Transfer Authority Form

Please fill in the form using BLOCK CAPITALS and black ink. Tick any boxes which apply.

Please complete section 1, 2, 3 and 4 if you wish to transfer your existing ISA to State Bank of India (UK) Limited.
If you wish to transfer ISA's from different providers, you must complete an Authority Form for each transfer request separately.
Transferring your Cash ISAs from one institution to another can take up to 15 business days.

1. Personal Details

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

First name

Middle name

Surname

Date of birth D D M M Y Y Y Y

Nationality

Country of Birth

Yes ☐ No ☐

If you only have temporary National Insurance Number, please tick 'No'

If Yes, please enter it

☐☐☐☐☐☐☐☐☐

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book

2. Contact Detail

Current Permanent Residential Address

Post Code ☐☐☐☐☐☐☐☐

Home Phone Number

Mobile Number ☐☐☐☐☐☐☐☐☐☐☐

Email Address

3. Information about the ISA to be transferred

Name of existing ISA Manager

Address of existing ISA Manager

Post Code ☐☐☐☐☐☐☐☐

Existing ISA Sort Code

Account Number/ Roll Number

Current Year Subscription

Do you want to transfer current tax year (2026/2027) subscription to SBI UK Yes ☐ No ☐

If you ticked 'Yes', how much have you subscribed this tax year? £

Please note that only whole transfer of current tax year subscriptions and interest can be accepted under HM Revenue & Customs ISA Regulations.

Previous Years Subscriptions

Do you want to transfer previous years subscriptions? Yes ☐ No ☐

Do you want to transfer the full or part amount of previous years subscriptions? Full ☐ Part ☐

How much do you wish to transfer from previous year subscriptions? £

4. Transfer Authority (Please tick only one option)

I authorise my existing ISA provider to transfer the Cash ISA (account number given in the information) to State Bank of India (UK) Limited.

I authorise my existing ISA provider to provide State Bank of India (UK) Limited with any information about the Cash ISA and to accept any instructions from them relating to the Cash ISA provider to either:

☐ Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with the transfer. Please note SBI UK fixed rate products can be withdrawn without notice and deposits may be returned.

☐ Depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of Interest or charges that may be applied.

I authorise State Bank of India (UK) Limited

- to hold my cash subscription and any interest earned on those subscriptions;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

Signature Date...../...../.....

5. Transfer acceptance

We are willing to accept this ISA transfer in line with the customer's instructions above, as long as the value is transferred as cash

I deem the date shown to be the transfer date of this ISA. Date...../...../.....

We must receive the transfer proceeds no later than 30 days from the date on this form.

Please send the transfer proceeds by cheque made payable to State Bank of India (UK) Limited A/C Name of Customer to:

ISA Team
State Bank of India (UK) Limited
Hygeia Building, 3rd Floor
66 College Road
Harrow, HA1 1BE
Telephone: 0800 532 532

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