

CASH LIFETIME ISA INVESTOR DECLARATION FORM

Investor Declaration

To make a charge-free withdrawal from your Lifetime ISA for the purchase of your first residential property you must declare all of the following information to the conveyancer you have appointed to act on your behalf.

If your house purchase does not proceed within 90 days of your conveyancer receiving the funds, and your conveyancer has not received an extension of time, your conveyancer should repay all of the funds withdrawn back into your Lifetime ISA account. Any funds not repaid into your Lifetime ISA will incur a government withdrawal charge that you will be required to pay to HM Revenue and Customs.

Returning this form

Please complete this form in BLOCK CAPITALS.

You can return this form by posting it to: **FREEPOST: RTEX-LLUT-KKKE, Paragon, PO Box 850, Wallsend NE28 5BJ**. Or, to get it to us quicker, you can email your form to: **IdentificationDocuments@online.paragonbank.co.uk**. If you choose to email it to us, please ensure you send a copy of the whole form and include all of the pages.

| Your details | |
|-----------------|---------|
| Title | |
| First name(s) | Surname |
| Current address | |
| Postcode | |

| Conveyancer details | |
|---------------------|---------|
| Title | |
| First name(s) | Surname |
| Address | |
| Postcode | |

| Property details | |
|--|--|
| Address of property you are buying | |
| Postcode | |
| Purchase price of property £ <small>(This cannot be more than £450,000)</small> | Expected completion date (DD/MM/YYYY) <small>(If known)</small> |

| Withdrawal details | |
|--|---|
| Paragon LISA account number | |
| I wish to | |
| <input type="checkbox"/> Close account | <input type="checkbox"/> Leave account open with a zero balance |
| OR | <input type="checkbox"/> Withdraw specific amount and keep account open (if applicable) £ |

If you decide to close your account, interest due to you will be included in your withdrawal amount. If you choose to keep your account open, any interest due, will be paid into your account.

When processing the withdrawal, we will be sending the money directly to your conveyancer. They will then use the money towards your home purchase.

I declare that:

- I am a first time buyer;
- I will only use the funds I have withdrawn from my Lifetime ISA towards buying my first residential property;
- the funds withdrawn from my Lifetime ISA do not exceed the purchase price of the property;
- the Lifetime ISA(s) from which I am withdrawing funds will have been open for at least 12 months when the withdrawal is made;
- I have not claimed/ I am not claiming a government bonus on funds in Help to Buy: ISA for this purchase or a previous property purchase;
- on completion the property will be my only or main residence, or will become so as soon as it is suitable for use;
- I am purchasing the property as a sole owner or as a joint owner with another individual who may already own the property;
- I am purchasing a legal interest in land with a loan taken as a charge over the property, or as a part of a regulated home purchase plan;
- I am not purchasing the property by means of a 'buy to let' mortgage; OR I am a UK Crown employee serving overseas, or their spouse or civil partner, and am purchasing the property by means of a 'buy to let' mortgage, with the intention of occupying the property as my only or main residence on my return to the UK;
- all funds withdrawn from my Lifetime ISA will pass directly from my Lifetime ISA manager to my conveyancer, who is an eligible conveyancer;
- I have provided the necessary information and declarations to my conveyancer;
- I authorise and have requested my conveyancer to provide all necessary information and declarations to my Lifetime ISA manager.

Once we've received the investor declaration and conveyancer declaration, we'll contact you to confirm the details are correct. There may be times where we need to discuss your withdrawal request with your conveyancer.

| | |
|--|------|
| <input type="checkbox"/> I agree the nominated conveyancer will act on my behalf to release the funds from my Lifetime ISA for purchasing my first house and I understand the funds will be released to the conveyancers bank account directly. | |
| Print name | |
| Signed | Date |