

Lifetime ISA withdrawal form

This form lets you withdraw cash from your Lifetime ISA to your nominated bank account.

When you withdraw money from your Lifetime ISA before the age of 60 – other than to buy your first home or if you have a terminal illness – you'll pay a government withdrawal charge of 25%. This may mean you get back less than you originally paid in.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you'd like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at help@ajbell.co.uk.

Please check the details on this form and sign and date this form and return it to:

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Personal details

Title

Surname

Forename(s)

Date of birth

National Insurance number

Permanent residential address

Postcode

Country

Daytime telephone number

Email address

AJ Bell Lifetime ISA account number

Cash withdrawal instruction

Amount to withdraw from my Lifetime ISA	<input type="text"/>
25% government withdrawal charge	<input type="text"/>
Net amount I will receive	<input type="text"/>

When we receive your completed form, we'll send the money to your nominated bank account within 5 working days. Payments will take one to three working days to reach your account.

If you want to change your nominated bank account, just log in and from the 'My account' menu, select 'Change my bank details'.

We may need to verify your bank account before we can make the payment. If this is the case, we'll be in touch to ask you for further information.

Declaration

- I request the withdrawal above and confirm there is enough cash in my Lifetime ISA to pay the withdrawal including the 25% government withdrawal charge.
- I understand that I will pay the 25% government withdrawal charge on the amount withdrawn.
- I accept it is my responsibility to check that the payment has reached my nominated bank account.
- I'm aware that withdrawing money from my Lifetime ISA means I can only pay money back in up to the value of my unused Lifetime ISA allowance for the tax year – which may be reduced by payments I've made to other ISAs in the tax year.
- I understand that the tax benefits on the withdrawn money will be lost.

Name

Date

Signature



You can withdraw money from a Lifetime ISA without paying the government withdrawal charge if you're buying your first home, are aged 60 or older, or have a terminal illness. If you choose to withdraw money from a Lifetime ISA in any other circumstances, you'll have to pay the 25% government withdrawal charge. This may mean you get back less than you originally saved. Please remember that if you withdraw money from your Lifetime ISA you won't be able to pay it back in if you have reached the annual ISA and/or LISA allowance limit for the current tax year.