

**Registered Office: Granville House Festival Park Hanley Stoke-on-Trent ST1 5TB**  
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### Request for Interest with No Tax Deducted

For investments made by or on behalf of a company, charity, exempt approved retirement benefit scheme,  
personal pension scheme or unit trust scheme

Re : \_\_\_\_\_ (Name of depositor)  
of \_\_\_\_\_ (Address of depositor)  
\_\_\_\_\_

Account  
Number(s) \_\_\_\_\_

#### DECLARATION AND UNDERTAKING

I hereby declare that the above named depositor is:

Tick (✓) one box below

- A company within the meaning of Section 832(1) of the Income and Corporation Taxes Act 1988; this includes a body corporate or unincorporated association (such as a club or society) but not a partnership.
- A charity in respect of which exemption is granted under Section 505(1)(c) of the Income and Corporation Taxes Act 1988.
- An exempt approved retirement benefit scheme within the meaning of Section 592(1) of the Income and Corporation Taxes Act 1988, or a scheme which is before the Board of Inland Revenue in order for them to decide whether it qualifies as an exempt approved scheme.
- A personal pension scheme within the meaning of Section 630 of the Income and Corporation Taxes Act 1988 providing approved personal arrangements as defined in that section.
- A unit trust scheme within the meaning of Section 75(8) of the Financial Services Act 1986.

I hereby undertake that if the status of the depositor should change, the Society will be notified of the fact without delay.

Signed \_\_\_\_\_ Date \_\_\_\_\_  
Full name \_\_\_\_\_  
Permanent Address \_\_\_\_\_  
Postcode \_\_\_\_\_  
Capacity in which signed \_\_\_\_\_

See the Notes overleaf concerning who should sign this form.

*For Office Info Only:*  
To be imaged and indexed under  
**Tax forms – Non-ind Gross**

## **NOTES**

This form should be signed as follows:

### **A COMPANY**

By the secretary, treasurer, or other officer authorised to sign by the directors or by the managing body.

### **A CHARITY**

Where the depositor is a charitable trust - by a trustee or by a person authorised to sign by the trustees.

Where the depositor is a body corporate or an unincorporated association - by the secretary, treasurer or other officer authorised to sign by the directors or the managing body.

### **AN EXEMPT APPROVED RETIREMENT BENEFIT SCHEME, OR A SCHEME WHICH HAS APPLIED FOR SUCH STATUS**

By a trustee or the administrator, or by a person authorised to sign by the trustees.

### **A PERSONAL PENSION SCHEME**

By a trustee or the administrator, or by a person authorised to sign by the trustees.

### **A UNIT TRUST SCHEME**

By the manager of the unit trust scheme.

### **ALL DEPOSITORS**

If the person signing the declaration is acting in a professional capacity he should put the firm's address. Otherwise the signatory's principal residential address should be shown, except in the case of a body corporate where the address of the registered office should be shown.