

- 1** Print and complete all fields accurately in BLOCK CAPITALS and black ink with a 'wet' signature.
- 2** Return this form along with the client's 'Investor Declaration' form and your contact details on company headed paper to Servicing Department, Forester Life Ltd, Foresters House, 2 Cromwell Avenue, Bromley BR2 9BF.

When you receive a declaration from the Lifetime ISA investor who has appointed you to purchase their first residential property home you must declare all of the following information to the manager of your client's Lifetime ISA.

If your client's house purchase does not proceed within 90 days of you receiving the Lifetime ISA funds and you have not received an extension of time, you should repay all of the funds to Forester Life. Any funds not repaid into your client's Lifetime ISA will incur a 25% withdrawal charge that your client will be required to pay to HM Revenue & Customs.

Please ensure you allow enough time for us to process your request. From the date of receiving a claim, in good working order, we aim to process the request within 5 working days, then you will need to allow 3-5 working days for the Direct Credit payment. We cannot guarantee a claim will be processed before this time frame, nor can we guarantee we can process urgent claims.

1. Conveyancer's Details

Full name	<input type="text"/>
Professional Address	<input type="text"/>
	Postcode
Unique professional body registration number	<input type="text"/>
Telephone number (in the event of queries)	<input type="text"/>
Email address	<input type="text"/>

2. Lifetime ISA Manager Information

Name of ISA manager	<input type="text" value="Forester Life"/>		
Address of ISA manager	<input type="text" value="Forester Life, Foresters House, 2 Cromwell Avenue, Bromley"/>		
	Postcode	<input type="text" value="BR2 9BF"/>	
Account details into which funds should be transferred by the Lifetime ISA Manager:			
Account Holder's Name	<input type="text"/>		
Sort Code	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	Account Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

3. Your Client's Details (the Lifetime ISA investor)

Title and Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Address (current residence)	<input type="text"/>
	Postcode
Lifetime ISA Plan number(s) (from which the fund are being withdrawn)	<input type="text"/>

Amount being withdrawn
(from the client's Lifetime ISA(s))

£

Property purchase price
(this cannot be more than £450,000)

£

Address
(of the property being brought)

Postcode

5. ISA Declaration and Authority

I declare that:

- I am an eligible conveyancer;
- I have received the information on this declaration from my client who has declared it to be true and complete to the best of their knowledge;
- I will only use the Lifetime ISA funds released towards the purchase price of my client's first residential property, or my client's first share in a residential property;
- if the purchase does not proceed within 90 days of the date of receipt of my client's Lifetime ISA funds, and I have not received an extension of time, I will return the withdrawn funds in full;
- on completion the property will be used by my client as their only or main residence;
- the property will be purchased with a loan taken as a charge over the property excluding a 'buy to let Mortgage' (other than where your client is a UK Crown employee serving overseas, or their spouse or civil partner, and cannot undertake immediate occupation on completion); and
- the information provided by me is true and complete to the best of my knowledge.

Name

Position

Signature of applicant

Date

Notes for Conveyancers

Your clients can use funds in their Lifetime ISA to buy their first residential property:

- with other purchasers who may or may not be first time purchasers, there is no limit on the number of individuals who can buy a single residential property;
- as joint owner with another person who may already own the property; and
- as joint owner with one or more individuals who will use funds held in their own Lifetime ISA.

Your client must:

- purchase a legal interest in land with a loan taken as a charge over the property i.e. a mortgage but not a 'buy to let Mortgage'. A 'buy to let mortgage is only permissible where your client is a UK Crown employee serving overseas, or their spouse or civil partner, and cannot occupy the property on completion;
- on completion of the purchase occupy the land as their only or main residence; and
- on completion of a partially completed dwelling occupy it as their only or main residence.

The amount withdrawn from your client's Lifetime ISA must be no more than the purchase price of the residential property.

The maximum purchase price of £450,000 applies irrespective of whether it is a sole or joint purchase.

Government bonus contributions from HMRC can take up to 7 weeks. If we are awaiting a bonus and your client would like to

use this towards their house purchase, they will need to contact Customer Services to ensure this contribution is added in time for the completion date. Otherwise this contribution will be allocated after the house purchase and will keep their Lifetime ISA with us open.

Time limits

If your client's purchase is continuing but is not expected to complete within 90 days of receiving funds from your client's Lifetime ISA you must ask your client's Lifetime ISA Manager for a 60 day extension.

If, having received an authorised extension of 60 days, your client's purchase is still continuing but is not expected to complete within the timescale of the extension you must ask your client's Lifetime ISA Manager for a **final** 30 day extension.

If, having received the final extension of 30 days, the purchase is not expected to complete within the timescale of that final extension (i.e. the purchase has been continuing for 180 days) you must return the withdrawn funds in full to your client's Lifetime ISA Manager. Where required, the house purchase withdrawal process may be repeated to release the funds without penalty to complete the purchase.

In the absence of a request for an extension, the withdrawal may be liable to a withdrawal charge.

Please ensure you provide us with your contact details on company headed paper, for audit purposes.