

This form is to be completed by the Planholder/house buyer.

## Congratulations on taking this exciting step towards buying your first home!

We're thrilled to be part of this exciting milestone. Please complete this form to access your Lifetime ISA savings and take the next step toward making your dream home a reality.

- 1 Print and complete this form to use your Lifetime ISA towards your first house purchase. Complete all fields in BLOCK CAPITALS and black ink.
- 2 Provide this form, along with the 'Conveyancer Declaration form' to your conveyancer that you have appointed to act on your behalf. They will then send this form along with the 'Conveyancer Declaration form' (which they must complete) to Servicing Department, Forester Life Ltd, Foresters House, 2 Cromwell Avenue, Bromley BR2 9BF.

If your house purchase does not complete within 90 days of your conveyancer receiving the funds from your Lifetime ISA, and your conveyancer has not received an extension of time, all of the funds withdrawn must be returned to Forester Life. If any funds are not repaid into your Lifetime ISA you will be liable to pay a 25% withdrawal charge on the shortfall.

Please note, if you have a Help to Buy ISA, you can only use the money from one type of ISA towards your house purchase. However if you are buying with someone else, and you have different types of ISAs, you can use them.

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.

If you would also like to make a Stocks and Shares ISA withdrawal, please contact Customer Services or visit MyPlans.

## 1. Your Details

Title and Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Address (permanent residence)	<input type="text"/>
Telephone number (in the event of queries)	<input type="text"/>
Email address	<input type="text"/>



### Stay connected with tailored updates

We may contact you about our products and services. Tick the boxes below to opt-in, you can opt-out anytime.

☐

Email

☐

SMS (text)

## 2. Property Information

Property purchase price (this cannot be more than £450,000)	<input type="text"/>
Address (of the property being brought)	<input type="text"/>

Postcode

Please turn over >

### 3. Lifetime ISA withdrawal

I am buying my first residential property and I want to withdraw

OR  OR

☐ Please tick this box if you wish to continue your contributions in to the Lifetime ISA

Government bonus contributions from HMRC can take up to 7 weeks. If we are awaiting a bonus and you would like to use this towards your house purchase, please contact Customer Services to ensure this contribution is added in time for your completion date. Otherwise this contribution will be allocated after your house purchase and will keep your Lifetime ISA with us open.

☐ Please tick this box if you would like to wait for all Government bonuses to be added, before processing your Lifetime ISA for house purchase

Plan number(s)	<input type="text"/>
Name of Lifetime ISA manager	<input type="text" value="Forester Life"/>
Address of Lifetime ISA manager	<input type="text" value="Forester Life, Foresters House, 2 Cromwell Avenue, Bromley"/> <div>Postcode <input type="text" value="BR2 9BF"/></div>

### 4a. Buyer's Conveyancer details

Name of your Conveyancer	<input type="text"/>
Address of your Conveyancer	<input type="text"/> <div>Postcode <input type="text"/></div>

### 4b. Seller's Conveyancer details (if known)

Name of seller's Conveyancer	<input type="text"/>
Address of seller's Conveyancer	<input type="text"/> <div>Postcode <input type="text"/></div>

### 5. Using your personal information

We will use the data you provide to administer your Plan. For more information on the data we collect, why we collect it, how we use it for processing purposes and how we store your information, please visit [foresters.com/UKprivacy](https://foresters.com/UKprivacy)

## 6. Declaration

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 element 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; and
- I authorise and have requested my conveyancer to provide all necessary information and declarations to my Lifetime ISA Manager.

I declare that the information I have provided is true and complete to the best of my knowledge and belief.

Name of applicant

Signature of applicant

Date

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## Notes for Lifetime ISA investors

You can use funds from your Lifetime ISA to buy your first residential property:

- by yourself;
- with other purchasers who may or may not be first time purchasers. There is no limit under the legislation relating to the Lifetime ISA on the number of individuals who can buy a single residential property;
- as joint owner with another person who may already own the property;
- as joint owner with one or more individuals who will also use funds held in their own Lifetime ISA or Help to Buy ISA.

You 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;
- on completion of the purchase immediately occupy the land as your only or main residence;
- on completion of a partially completed dwelling occupy it as your only or main residence.

If you are a UK Crown employee serving overseas (e.g. a member of the armed forces serving abroad), or their spouse or civil partner, you may purchase the property by means of a 'buy to let' mortgage, on the understanding that you will occupy the property as your only or main residence on your return to the UK.

The amount withdrawn from your Lifetime ISA must be less than the purchase price of your first 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 you would like to use this towards your house purchase, please contact Customer Services to ensure this contribution is added in time for your completion date. Otherwise this contribution will be allocated after your house purchase and will keep your Lifetime ISA with us open.

