

Company name:

Adviser name:

Advised sale: Yes  No

Please choose delivery option:

Original policy to client copy to adviser  or

Original policy plus copy to adviser

## Junior ISA

## Application form

### PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

Please note, only a parent/guardian can open a Junior ISA for their child, but once it has been opened, anyone can pay into the plan. If the payer is someone other than the child's parent/guardian, i.e. grandparent, please also complete Section B.

#### A Parent/Guardian Details

1 Mr/Mrs/Ms/Miss/Other	2 Male <input type="checkbox"/> Female <input type="checkbox"/>
3 Forename(s)	4 Surname
5 Address	Postcode
6 Your relationship to the child	
7 Telephone No. (Home)	Telephone No. (Business)
Telephone No. (Mobile)	Email
8 Date of birth <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"/>	

#### B Payer Details

If the parent/guardian is also the payer, please tick the box 'As above'. If the payer is anyone other than the child's parent/guardian, i.e. grandparent, please complete the following information.

As above

1 Mr/Mrs/Ms/Miss/Other	2 Male <input type="checkbox"/> Female <input type="checkbox"/>
3 Forename(s)	4 Surname
5 Address	Postcode
6 Your relationship to the child	
7 Telephone No. (Home)	Telephone No. (Business)
Telephone No. (Mobile)	Email
8 Date of birth <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"/>	
9 Signature	

#### C Child's Details

I apply to open a Junior ISA for:

1 Forename(s)	2 Male <input type="checkbox"/> Female <input type="checkbox"/>
3 Surname	
4 Address	Postcode
5 Date of birth <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"/>	
6 National Insurance (NI) Number? (if your child has one)	<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"/>

## D Investment Details

I apply to subscribe to a Shepherds Stocks and Shares Junior ISA for my child, for the tax year

And each subsequent tax year until further notice, in accordance with the Terms and Conditions

### I wish to invest:

Regular Monthly Premium £  (Min £10 a month) Lump-sum £  (Min £100)

**Maximum total contributions must not exceed JISA limits**

If you are investing by lump-sum, please forward your cheque for the stated amount together with this application form to: The Shepherds Friendly Society, FREEPOST, Haw Bank House, 2 High Street, Cheadle. SK8 1AL.

If you are contributing by a regular monthly premium, please fill in the Direct Debit form attached to this application form.

## E Declarations

### I declare that

- all subscriptions made, and to be made, belong to the child;
- I am 16 years of age or over;
- I am the child/I have parental responsibility for the child;
- I / the child does not have a Child Trust Fund Account;
- I will be the registered contact for the Junior ISA.
- The child is resident in the United Kingdom, or is a UK Crown servant, a dependent of a UK Crown servant, or is married to/in a civil partnership with a UK Crown servant
- I have not subscribed and will not subscribe to another Junior ISA of this type for this child;
- I am not aware that this child has another Junior ISA of this type;
- I am not aware of other Junior ISA subscriptions that will result in this child exceeding the annual limit;
- I will not knowingly make subscriptions to Junior ISA's for this child that will result in the subscription limit being exceeded.

### I authorise The Shepherds Friendly Society Limited

- to hold the child's subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;
- and**
- to make on the child's behalf any claims to relief from tax in respect of Junior ISA investments.

## F Consents

I have read the Key Features document and agree that this application will form the basis of the contract with The Shepherds Friendly Society Limited.

I declare that this application form has been completed to the best of my knowledge and belief.

The Shepherds Friendly Society Limited may use information provided in relation to this application to make electronic searches about me at Credit Reference Agencies that supply information, including information from the Electoral Roll, for the purposes of verifying my identity. I understand that these Agencies will record details of any such searches whether or not this application proceeds.

I understand that The Shepherds Friendly Society Limited reserve the right to request any such other documentary evidence it considers necessary to assist in the verification of my identity.

I understand that The Shepherds Friendly Society Limited may use information provided in relation to this application to process this application and for the ongoing management of my policy. Information may be held on computer, paper file or other appropriate medium for as long as the application is being considered, for as long as the policy remains in force and for an appropriate period thereafter.

Your information will be held by The Shepherds Friendly Limited. The information that you have supplied will be kept confidential and will not be disclosed to any other party without your consent unless it is lawful to do so.

It may be used to keep our records up to date, for business analysis and market research purposes and to advise you by post, telephone and /or electronic methods about any products and services offered by The Shepherds Friendly Society Limited and its subsidiaries that may be of interest to you. We may pass your details to other carefully selected organisations but only for the purposes mentioned above. If you would like to request a copy of the information held about you please write to The Shepherds Friendly Society Limited Data Protection co-ordinator. A fee may be charged for providing information.

If you do not want to receive such marketing information please tick the box.

Signature (Parent/Guardian)

Date

Full Name

**(BLOCK CAPITALS PLEASE)**

**Note: Acceptance of this application is at the discretion of Shepherds Friendly.**

**The Shepherds Friendly Society Limited** Registered Office: Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL.

**Tel:** 0161 428 1212 **Fax:** 0161 428 3666 **Email:** info@shepherdsfriendly.co.uk **Web:** www.shepherds.co.uk

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The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.

