

Junior ISA

This application enables a person with parental responsibility to apply to be the Registered Contact of a child's Junior ISA. Please complete **IN BLOCK CAPITALS** and return this form to Shepherds Friendly, Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL or by emailing a scanned copy to members@shepherdsfriendly.co.uk

Company name:

Adviser name:

Advised sale: Yes No

Please choose delivery option:

Original policy to client copy to adviser Original policy plus copy to adviser

A Applicant's details

1 Mr/Mrs/Ms/Miss/Other

2 Male Female

3 Date of birth / /

4 Forename(s)

5 Surname

6 Address

Postcode

7 Telephone No. (Home)

Telephone No. (Mobile)

8 Email

B Child's details

I APPLY TO BECOME THE REGISTERED CONTACT FOR THE JUNIOR ISA OF:

1 Forename(s) 2 Surname

3 Date of birth / /

4 Male Female

5 Address

Postcode

6 National Insurance (NI) Number? (If your child has one)

Tick this box if you are applying because you have adopted the child named above.

C Declaration

For your own benefit and protection we recommend that you read these terms carefully before agreeing to them. If you have any questions or would like to discuss them in further detail, please get in touch.

I declare that:

- I am the child/I have parental responsibility for the child
- I will be the Registered Contact for the Junior ISA
- I am 16 years of age or over
- I agree to Junior ISA Terms and Conditions

I authorise Shepherds Friendly:

- To hold the HM Revenue and Customs contributions, 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.

I agree to these terms and I can confirm that I have not received financial advice from Shepherds Friendly in relation to the purchase of this plan

Please tick box

How will we use your data?

To help us handle any queries you might have and for keeping records of communications.

If you contact us by telephone, email or post we may collect and retain your contact details and the contents of your communication in hard and/or electronic copy. We would like to make you aware that calls to Shepherds Friendly may be recorded for training or monitoring purposes.

To work with carefully selected third parties who help us to administer your plan and provide essential services to you. For example, to make electronic searches about you 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.

Please tick box

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.

Please tick box

To collect and process personal information about you in relation to this application and for the ongoing management of my plan. 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 plan remains in force and for an appropriate period thereafter.

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.

To make a claim on your plan you will need to complete a claim form, which may require additional personal information to be submitted, which may include sensitive personal data as per the GDPR definition. This enables us to handle your claim quickly and efficiently. It also allows us to carry out necessary investigative processes to prevent fraudulent claims.

Your information will be held by The Shepherds Friendly Society Limited. The information that you have supplied will be held securely, in accordance with data protection rules and will not be disclosed to any other party without your consent unless it is lawful to do so.

If you would like to request a copy of the information held about you please write to The Shepherds Friendly Society Limited Data Protection Officer.

Your communication preferences

Your privacy is of the highest importance to us, and unless you give us permission to do so, we will never release your personal information to any outside company for their mailing or marketing purposes.

To ensure that we send you the right information to you, please let us know your communication preferences:

I would like to receive marketing communications by:

Post Email Telephone Text message

You can view our Privacy Notice online by visiting our website - www.shepherdsfriendly.co.uk/privacy-notice

If you wish to update or opt out of receiving marketing communications at anytime, please get in touch by phone or email.

Essential member communications

Please note: We are required by our regulators, the Financial Conduct Authority and the Prudential Regulation Authority, to give all our members access to information such as their transactions, bonus rates and payment details via an annual bonus statement. In addition to this we are also required to invite members to our Annual General Meeting, which involves the distribution of a voting paper, voting guide and AGM information. We also collate member feedback via annual surveys, which helps us improve our plans and service offered to our members. These essential and required communications will be sent out at least once a year.

Signature of applicant

Date



The Shepherds Friendly Society Limited Registered Office:

Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL.

Tel: 0800 526 249

Email: info@shepherdsfriendly.co.uk

Web: www.shepherdsfriendly.co.uk

Shepherds Friendly is a trading name of the Shepherds Friendly Society Limited which is an incorporated friendly society under the friendly societies act. Registered No 240F. Authorised By the prudential regulation authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, financial services register no 109997. The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.

