

Junior ISA

Please complete in BLOCK CAPITALS and answer all questions

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 Payer's details

1 Mr/Mrs/Ms/Miss/Other

2 Male Female

3 Forename(s)

4 Surname

5 Address

Postcode

6 Telephone No. (Home)

Telephone No. (Business)

Telephone No. (Mobile)

Email

7 Date of birth / /

B Child's details

1 Junior ISA plan number

2 Forename(s)

3 Surname

5 Address

Postcode

5 Date of birth / /

The child named above will be the beneficial owner of the plan investments.

C How much do you want to top your child's Junior ISA up with?

Lump sum and monthly contributions combined cannot exceed the maximum allowance in any one financial year. A financial year starts on the 6th April and ends on the following 5th April. If you are uncertain about the maximum increase in contributions you can make for the rest of the financial year, please call us on: 0800 526 249.

1 Lump sum investment

Amount: £ (Minimum £10)

Please remember to enclose your cheque, made payable to 'Shepherds Friendly Society'

2 Increase/Decrease in monthly contributions (if you are already contributing to this Junior ISA)

New total monthly contributions: £

3 Set up a new monthly Direct Debit contribution for this Junior ISA

Monthly payment: £ Please complete the Direct Debit form attached

Please note that the minimum monthly contribution is £10 and the minimum increase to existing contributions is £10 per month. You can decrease as you like as long as it does not go below minimum monthly amount.

D 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:

- 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;
- 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 dependant 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 ISAs 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.

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

I confirm acceptance of the above conditions.

Signature (Parent/Guardian)

Date

Full name

(BLOCK CAPITALS PLEASE)

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

Our privacy promise

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

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



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

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