

# Junior ISA Application Form

IF YOU HAVE ANY QUERIES ABOUT OPENING AN ACCOUNT PLEASE CALL US ON 01892 700834

PLEASE COMPLETE ALL SECTIONS

## Applicant Details (Registered contact)

Title (eg. Mr/Mrs/Dr etc)

Surname

Forename(s) in full

Permanent residential address

Postcode

Date of birth

Place of birth (Town)

Country of birth

Country of residence

Country of taxation

Nationality

National Insurance Number/  
National Identifier

If you have more than one nationality please list on a separate sheet together with the relevant national identifier for that nationality – further details regarding national identifiers can be found on our website or call us.

Telephone (Home)

Telephone (Work)

Telephone (Mobile)

Email

If you have been living at the above address for less than 12 months please provide your previous address

Postcode

## Child's Details

### I apply to open a JISA for

Child's title (if any)

Forename(s) and Surname (Full)

Child's address

Postcode

Child's date of birth

Town/City of birth

Country of birth

Nationality

Child's National Insurance Number/National Identifier (if they have one)

## Subscription Details

I apply to subscribe £

for the tax year ending 5th April  and each subsequent year until further notice.

I enclose a cheque for £  I wish to subscribe by Debit card  (✓)

## Subscriptions

I apply to subscribe £

(minimum initial subscription is £100 or minimum monthly subscription is £50)

for the tax year ending 5th April  and each subsequent year until further notice.

I wish my money to be invested as follows (amount and details):

£

£

£

Please enclose a separate sheet if necessary.

Where investment details are not given the funds will be held on deposit pending instruction.

I enclose a cheque for £  I wish to subscribe by Debit card  (✓)

I wish to set up a Direct Debit  (✓)

## Declaration

### I declare that

- the applicant is over 16 and is the child, or has parental responsibility for the child, who will hold the JISA
- the application is to open a stocks and shares JISA
- the personal details are true
- the child who will hold the JISA does not hold a Child Trust Fund
- the child who will hold the JISA is either
  - resident in the UK
  - a UK Crown servant
  - married to or in a civil partnership with a UK Crown servant
  - a dependent of a UK Crown servant
- the applicant is the person who will be the first registered contact for the account
- if the application is for a stocks and shares JISA that
  - the applicant has not subscribed to another stocks and shares JISA for the child
  - is not aware of any other stocks and shares JISA held by the child
- as far as the applicant is aware, subscriptions made to any other JISA for the child in the year have not exceeded the annual subscription limit
- the applicant will not knowingly make subscriptions that will result in the annual subscription limit being breached

### I authorise Jarvis Investment Management Ltd

- to hold the child's subscriptions, JISA 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 JISA investments

I confirm that the information is true and complete. I have read, understood and acknowledge the risk warning issued by the Account Manager. I agree to be bound by the enclosed Terms and Conditions. For the purpose of our Terms and Conditions JISAs are classed as ISAs.

Signature of  
Registered Contact

Date