

JISA Model telephone application script

What is your full name? (Forename, middle initials and surname).

What is your address (including postcode)?

What is the child's full name? (Forename, middle initials, and surname).

What is the child's address (including postcode)?

What is the child's date of birth? (Day/month/year)

What is the child's National Insurance number (if they are over 16 and have one)?

What type of JISA do you want to open, cash or stocks and shares?

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

Do you declare that:

- You are aged 16 years or older?
- You have parental responsibility for the child/are the child?
- The child does not have a CTF account?
- You will be the registered contact for the JISA?

The child is resident in the UK, 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?

Please confirm that you:

- have not subscribed and will not subscribe to another JISA of this type for this child
- are not aware that this child has another JISA of this type
- are not aware of other JISA subscriptions that will result in this child exceeding the annual limit

- will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded

By applying to open a JISA you authorise us to carry out certain functions on your and the child's behalf, and to make a written copy of your application.

I will now read back the application and declaration to you - if you agree that they are correct I can open the JISA as soon as I receive a subscription from you (and after any withdrawal period expires).