

JISA Model application form

Applicant's title (if any).....

Full name
.....

Applicant's address
.....

.....
Postcode.....

I apply to open a JISA for

Child's title (if any)
.....

Full name.....
.....

Child's address
.....

.....
Postcode.....

Child's date of birth

Child's National Insurance number (if they are over 16 and have one).....

Type of JISA (cash or stocks and shares)
.....

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

- I declare that
- I am 16 years of age or over

- I am the child/I have parental responsibility for that child (delete which does not apply)
- I/the child does not have a Child Trust Fund account
- I 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
- I have not subscribed and will not subscribe to another JISA of this type for this child
- I am not aware that this child has another JISA of this type
- I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit
- I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded

I authorise (provider's name)

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

Managers need to include wording to satisfy the FCA requirement on reading and understanding terms and conditions - see

<http://www.fsa.gov.uk/pubs/other/understood.pdf>

I confirm that to the best of my belief the information in this form is true.

Signed Date

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