

Web:

Shepherds Junior ISA

Application Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Applicant/Payer Details

- 1** Mr/ Mrs/ Ms / Miss / Other **2** Male Female **3** Surname _____
- 4** Forename(s) _____
- 5** Address _____
Postcode _____
- 6** Telephone No. **(Home)** _____ Telephone No. **(Business)** _____
Telephone No. **(Mobile)** _____
- 7** E-mail address _____
- 8** Date of Birth _____

B Child's Details

I apply to open a **Junior ISA** for:

- 1** Forename(s) **2** Male Female _____
- 3** Surname _____
- 5** Address _____
Postcode _____
- 8** Date of Birth _____
- 9** National Insurance (NI) Number? (if your child has one) _____

C Investment Details

I apply to subscribe to a Shepherds Stocks and Shares Junior ISA for my child, for the tax year /

and each subsequent tax year until further notice, in accordance with the Terms and Conditions

I wish to invest:

Regular Monthly Premium £ (Min £10 a month) Lump-sum £ (Min £100)

Maximum total contributions must not exceed JISA limits

If you are investing by lump-sum, please forward your cheque for the stated amount together with this application form to:
The Shepherds Friendly Society, FREEPOST, Shepherds House, Stockport Road, Cheadle, Cheshire, SK8 2AA.

If you are contributing by a regular monthly premium, please fill in the Direct Debit form attached to this application form.

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 Account;
- I will be the registered contact for the Junior ISA.
- The child is resident and ordinarily 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 ISA's 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 have read the Key Features document and agree that this application will form the basis of the contract with The Shepherds Friendly Society Limited.

I declare that this application form has been completed to the best of my knowledge and belief.

The Shepherds Friendly Society Limited may use information provided in relation to this application to make electronic searches about me 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.

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.

I understand that The Shepherds Friendly Society Limited may use information provided in relation to this application to process this application and for the ongoing management of my policy. 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 policy remains in force and for an appropriate period thereafter.

Your information will be held by The Shepherds Friendly Limited. The information that you have supplied will be kept confidential and will not be disclosed to any other party without your consent unless it is lawful to do so.

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. We may pass your details to other carefully selected organisations but only for the purposes mentioned above. If you would like to request a copy of the information held about you please write to The Shepherds Friendly Society Limited Data Protection co-ordinator. A fee may be charged for providing information.

If you do not want to receive such marketing information please tick the box.

Signature _____

Date _____

Full Name _____

(BLOCK CAPITALS PLEASE)

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

The Shepherds Friendly Society Limited

Registered Office: Shepherds House, Stockport Road, Cheadle, Cheshire SK8 2AA **Tel:** 0161 428 1212 **Fax:** 0161 428 3666

Email: info@shepherdsfriendly.co.uk **Web:** www.shepherds.co.uk

