



Shepherds Junior ISA

Top up
Application Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Investor Details

1 Mr/ Mrs/ Ms / Miss / Other 2 Male Female 3 Surname _____

4 Forename(s) _____

5 Address _____

 _____ Postcode _____

6 Telephone **(Home)** _____ Telephone **(Mobile)** _____
 Telephone **(Business)** _____ Email address _____

7 Date of Birth _____

B Child's Details

1 Junior ISA Plan Number _____

2 Forename(s) _____ 3 Surname _____

4 Address _____
 _____ Postcode _____

5 Date of Birth _____

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

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

Lump sum and Monthly Contributions combined cannot exceed the maximum of £3,600 in any one financial year. A financial year starts on the 6th of April and ends on the following 5th of 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 0161 428 1212.

1 Lump Sum Investment
 Amount: £ Minimum £100 _____

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 premium: £ Please complete the Direct Debit form attached _____

Please note that the minimum total monthly contribution is £10 and the minimum increase/decrease to existing contributions is £10 per month.

- I hereby apply to increase/decrease the subscription to this Shepherds Friendly Society Junior ISA.
- 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.

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

THE SHEPHERDS FRIENDLY SOCIETY IS INCORPORATED UNDER THE 1992 FRIENDLY SOCIETIES ACT NO.240F. AUTHORISED AND REGULATED BY THE FINANCIAL SERVICES AUTHORITY AND ENTERED ON THE FINANCIAL SERVICES AUTHORITY REGISTER, NO:109997.

The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.

The Shepherds Friendly Society Limited
Shepherds House
Stockport Road
Cheadle
Cheshire
SK8 2AA

Instruction to your Bank or Building Society to pay by Direct Debit

Name(s) of Account Holder(s)

Bank/Building Society Account Number

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Branch Sort Code

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Name and full postal address of your Bank or Building Society

To: The Manager	Bank/Building Society
Postcode	

Originator's Identification Number

6	7	2	7	8	3
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Reference Number (for Office use only)

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This is not part of the instruction to your bank or Building Society.
Preferred Collection Date (PLEASE TICK)

<input type="checkbox"/> 1st	<input type="checkbox"/> 8th
<input type="checkbox"/> 16th	<input type="checkbox"/> 24th
<input type="checkbox"/> Monthly	<input type="checkbox"/> Annually

INSTRUCTIONS TO YOUR BANK OR BUILDING SOCIETY

Please pay The Shepherds Friendly Society Limited Direct Debits from the account detailed in this instruction subject to the safeguard assured by the Direct Debit Guarantee.

I understand that this instruction may remain with The Shepherds Friendly Society Limited and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)

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Date

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Banks and Building Societies may not accept Direct Debit instructions from some types of account

This guarantee should be detached and retained by the Payer

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, The Shepherds Friendly Society Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request The Shepherds Friendly Society Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by The Shepherds Friendly Society Limited or your Bank or Building Society you are entitled to a full and immediate refund of the amount paid from your Bank or Building Society.
- If you receive a refund you are not entitled to, you must pay it back when The Shepherds Friendly Society Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your Bank or Building Society. Written confirmation may be required. Please also notify us.