

Junior ISA Transfer Application

Please use this form for transferring either a stocks & shares Junior ISA or a cash Junior ISA to our Junior ISA (“JISA”) through our Online Investment Service.

This application is subject to the Online Investment Service Terms of Business, which you should read carefully and ensure you understand fully before completing and signing this form. Please talk to us if there is anything in the Terms or this application which you do not understand or about which you require further clarification.

- Please ensure that you complete and return a **JISA Transfer Letter of Authority** with this form
- A list of the investments you are transferring should also be submitted where possible. For example, a copy of your last valuation statement

The Bestinvest Online Investment Service is an online service. If you are transferring the existing JISA as cash, we will not automatically invest cash received as part of a transfer. You should choose the new investments once the cash has been paid into this JISA following receipt from the current provider. Investment selections should be made online at bestinvest.co.uk/ois. You can check the cash balance at any time by going to our website and logging in to this account. If you are new to the Bestinvest Online Investment Service, we will send you an email letting you know how to set up your password and log in to this account.

Please note: Our Online Investment Service is only available to persons aged 18 years or over. As such, Junior ISA applications can only be made by the person with parental responsibility, rather than the child themselves.

Need help in completing this form? Call us on **020 7189 2400**.

Please complete all sections of this form in **BLOCK CAPITALS**

1. Parent's details Please complete all sections with details of the parent or person with parental responsibility

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First Names (in full)

Permanent Residential Address

Postcode

Date of Birth

Email (you must have an email address to join the Bestinvest Online Investment Service)

Daytime Telephone Number

Country of Birth

Citizenship

Evening Telephone Number

Additional Citizenship (if applicable)

Additional Citizenship (if applicable)

Client Number (existing Bestinvest clients only)

National Insurance Number (or equivalent Tax Identification Number)

2. Child's details Please complete all sections

<input type="text"/>	<input type="text"/>	
First Names (in full)		
<input type="text"/>		
Permanent Residential Address		
<input type="text"/>		
<input type="text"/>	Postcode <input type="text"/>	
Date of Birth	Country of Birth	
<input type="text"/>	<input type="text"/>	
Citizenship	Additional Citizenship (if applicable)	Additional Citizenship (if applicable)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Client Number (existing Bestinvest clients only)	National Insurance Number	
<input type="text"/>	<input type="text"/>	

3. Your documentation Only complete this section if you are new to the Bestinvest Online Investment Service

As a Bestinvest client you have a choice about how you receive your contract notes and statements. Please indicate your choice by ticking one of the following options.

- Online only (free of charge) Online and by post (a charge of £37.50 plus VAT per quarter will be made, which covers all Bestinvest Online Investment Service accounts you may have)

4. Your income

If you are transferring income units please select one of the following two options. If you do not indicate which option you wish to use then we will select the 'Cash on account' option as default.

- Reinvest Any income will be used to purchase further units in this fund (please note that this option is not available for all funds)
- or
- Cash Amount Any income will be held as cash in the relevant account

5. Marketing communications

We would like to contact you about investment guides, news, events and other ways we can help you. We usually do this by email, but may occasionally send you information through the post or by phone. These communications are **optional** and separate to any service based messages required under regulations relating to products or services that you may hold.

Please tick the box if you would like to stay informed by email

Please tick the box if you would also be happy to receive marketing communications by:

Post Telephone

You can unsubscribe using the links in the messages that we send or choose what you receive from us at any time. Full details of how we use and secure your personal information is documented in our privacy notice www.bestinvest.co.uk/help/privacy-notice; if you have any questions about how we handle your personal information, you can email us at dataprotection@evelyn.com

6. Declaration & signature

I declare that:

- I confirm that I have received the Bestinvest Online Investment Service Terms of Business (incorporating the ISA and Junior ISA Terms and Conditions); I also confirm that I have been given the opportunity to read the Terms and the Key Facts, and that I have had any questions arising answered satisfactorily. I declare that this form has been completed to the best of my knowledge
- The information given in this application is, to the best of my knowledge, correct and I will inform Bestinvest (Brokers) Limited ("Bestinvest") immediately of any changes to these details
- I am 18 years of age or over
- I have parental responsibility for this child
- The child does not have a Child Trust Fund account.
- I will be the registered contact for the JISA
- Both the child and the person with parental responsibility are resident in the UK, or a UK Crown servant, a dependant of a UK Crown servant or 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 confirm that I have declared all citizenships and/or tax residence(s) to Bestinvest on this application form for the child and me. I understand this is required for Bestinvest to comply with UK and international tax legislation

I authorise Bestinvest (Brokers) Limited to:

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

I understand that:

- Any fees or charges arising in connection with this JISA will be deducted from this account
- I am required to complete and maintain a Direct Debit Mandate which will be used to (i) verify my bank details and (ii) will be used if I choose to make monthly savings to the child's Online Investment Service Accounts
- Any fund rebates will be paid into the JISA
- The information I provide on this application form will be processed in accordance with Bestinvest's data protection statement contained in the Bestinvest Online Investment Service Terms of Business
- In order to comply with Money Laundering Regulations, Bestinvest will use the information I have provided to check my identity and may undertake a search with a credit reference agency (who will record that an enquiry has been made) for the purposes of verifying my identity. I also understand that the credit reference agency may check the details I have supplied and that Bestinvest may request additional evidence of identity from me before my application is processed
- Instructions may be delayed or rejected if this application form is not fully completed

This application form is for our non-advised service and by signing this declaration you are confirming you have not received any advice from Bestinvest on the suitability of this product and the investments you choose to hold within it.

Furthermore, you are aware that, because Bestinvest has not provided you with advice regarding this transfer, that any rights to redress relating to the transfer's suitability may be affected.

By signing below I agree to the above declaration

X PLEASE SIGN HERE **X**

Date

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Once completed, please return this form to: **Second Floor, Liver Building, Pier Head, Liverpool L3 1NY**

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