

# 2024/25 Junior ISA Application

Please use this form to apply for a 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.

The Bestinvest Online Investment Service is an online service and therefore you should choose the new investments once the cash you are subscribing has been paid into this JISA. 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)

Telephone Number

Country of Birth

Citizenship

Nationality

Additional Citizenship (if applicable)

Additional Nationality (if applicable)

Client Number (existing Bestinvest clients only)

National Insurance Number

Are you tax resident in a country other than the U K?

Yes

No

If you have ticked 'Yes' which country?

If you have ticked 'Yes' please provide your Tax Identification Number (TIN)

Is this your main tax residency Yes  No

If you do not have a TIN please explain why?

## 2. Child's details Please complete all sections

Title

Surname

First Names (in full)

Permanent Residential Address

Postcode

## 2. Child's details (continued)

Date of Birth

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

Telephone Number

Country of Birth

Citizenship

Nationality

Additional Citizenship (if applicable)

Additional Nationality (if applicable)

Client Number (existing Bestinvest clients only)

National Insurance Number

Are you tax resident in a country other than the U K?

Yes

No

If you have ticked 'Yes' which country?

If you have ticked 'Yes' please provide your Tax Identification Number (TIN)

Is this your main tax residency Yes  No

If you do not have a TIN please explain why?

## 4. 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)

## 5. Bank details

Name(s) of account holder(s)

Bank/building society account number

Branch sort code

Bank name

## 6. Marketing communications

We'd like to send you some occasional updates, such as news, investment guides and invitations to events. You can unsubscribe at any time and you'll find full details of how we use and secure your personal information in our privacy notice

[www.bestinvest.co.uk/help/privacy-notice](http://www.bestinvest.co.uk/help/privacy-notice)

If you would rather not hear from us please tick the relevant box below.

Email  Phone  Post

## 7. Declaration & signature

I agree to the following statements in relation to my on-line application for a stocks and shares Junior ISA:

I apply to subscribe to a stocks and shares Junior ISA for this child for the tax year 2024/25 and each subsequent year until further notice.

### I declare that:

I have parental responsibility for the child who will hold this Junior ISA;

I am 18 years of age or over;

I agree to be the first registered contact for this Junior ISA and will receive all correspondence;

Subscriptions have not and will not exceed the annual subscription limit in the same tax year to a cash Junior ISA and a stocks and shares Junior ISA for this child; The personal details provided for myself are correct;

The personal details provided for the child who will hold this Junior ISA are correct;

The child who will hold this Junior ISA does not already hold a Child Trust Fund;

The child who will hold this Junior ISA does not already hold a stocks and shares Junior ISA. Alternatively, if the child who will hold this Junior ISA does already hold a stocks and shares Junior ISA, this account is being transferred to Bestinvest in full.

The child who will hold this Junior ISA is resident and ordinarily resident in the United Kingdom or, if not so resident, either is a United Kingdom Crown servant, or is married to, in a civil partnership with, or is a legal dependent of, a person who is a United Kingdom Crown servant;

I confirm that I have declared all my citizenships and/or tax residences to Bestinvest on this application form for the child and me.

### I authorise Evelyn Partners Investment Management Services Limited to

- Appoint an external custodian on my behalf to hold my cash subscription, 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 Junior ISA investments.
- I Agree to the Junior ISA terms and conditions which form part of the Bestinvest Online Investment Service Terms of business.
- Where required, share information about the child's financial account(s) with the relevant tax authorities. It is my/our responsibility to be aware of any tax requirements pertaining to the child in my/our country of permanent or tax residence and in the country in which I/we intend to open a financial account and to take any independent tax or legal advice where required. I declare that this application form has been completed to the best of my knowledge and belief. By signing below I agree to the above declaration

Name

X

PLEASE SIGN HERE

X

Date

D D | M M | Y Y | Y Y

### Once completed, please submit by either:

- **Signing this form digitally** using Adobe sign.
- **Printing out and posting** to Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY.
- **Scanning the form and emailing** to [best@bestinvest.co.uk](mailto:best@bestinvest.co.uk)

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