

HL JUNIOR STOCKS AND SHARES ISA APPLICATION

HARGREAVES
LANSDOWN

If you have any questions call us on ☎ 0117 980 9950, visit 🌐 www.hl.co.uk or email us at ✉ helpdesk@hl.co.uk

AWJ13

1. Child's details – please make sure the child is eligible for a Junior ISA; turn over for help

Title (Master, Miss, etc):	First name(s):	Surname:						
Address:								
Postcode:	Date of birth: <table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Nationality:
D	D	M	M	Y	Y			

2. Child's National Insurance Number – ignore if your child is under 16

This must be the child's National Insurance Number

National Insurance no. (if over 16)

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 If the child is over 16 and has no NI No. tick here ☐

3. Your details – you must be a person with parental responsibility for this child

Title (Mr, Mrs, etc):	First name(s):	Surname:									
Address:											
Postcode:	Date of birth: <table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Nationality:			
D	D	M	M	Y	Y						
National Insurance No. <table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										Tick here if you have no NI No. <input type="checkbox"/>	Main tel. no:
You will be the registered contact for this Junior ISA. Turn over for details. Email address:											

4. Declaration and signature – the parent/guardian named in section 3 must sign here

I'm the parent/guardian named in section 3 and I agree to the declaration on page 2.

Please sign here 	SIGNATURE	Date: <table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y
D	D	M	M	Y	Y			

5. If someone else is paying into the Junior ISA, please fill in their details below

Title (Mr, Mrs, etc):	First name(s):	Surname:						
Address:								
	Postcode:	Date of birth: <table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y
D	D	M	M	Y	Y			

I understand Hargreaves Lansdown will run an electronic check to verify my identity, and if this is unsuccessful, will contact me to provide identity documents. I also understand that any payment I've made to the Junior ISA cannot be reclaimed.

Please sign here 	SIGNATURE	Date: <table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y
D	D	M	M	Y	Y			

6. How much would you like to pay into the Junior ISA? – Junior ISA limit: £9,000

Lump sum: (min £100)	Your cheque must be payable to 'HLAM Junior ISA Client A/C'. If the cheque doesn't show your name please turn over for details.
AND/OR Monthly saving: (min £25)	Please make sure you complete the Direct Debit slip on the back of the form.

7. Would you like to choose the investments now? – ignore this step if you'd like to choose later

Investment choice Full fund/share name	Lump sum (min. £100 per fund)	Monthly saving (min. £25 per investment)
	£	£
	£	£
If you'd like to choose more than two investments, let us know on a separate sheet.	Cash £	£
	Total £	£

8. What would you like to do with any income the investments make? – select one

Ignore this step if you've already told us your income preference for the Junior ISA and you'd like to keep this the same. ☐ Reinvest income automatically **OR** ☐ Hold income as cash in the Junior ISA

Turn over to read the declaration and complete the Direct Debit mandate (if applicable)

9. Declaration – for the parent/guardian named in section 3

For your own benefit and protection you should read our Terms and Conditions carefully before committing to an investment. If you do not understand any point please ask us for further information. When you use our services we will take this as acceptance and agreement of our terms, and you will be bound by them.

I am applying to open an HL Junior Stocks and Shares ISA (JISA). I declare that I am 18 years of age or over and have parental responsibility for the child named above. 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 confirm that the child does not have a Child Trust Fund account. 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 and 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 HL to: a) Hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash; and b) Make on the child's behalf any claims to relief from tax in respect of JISA investments.

I have read, agreed to and retained the Terms and Conditions, the Important Investment Notes and Key Features of the HL JISA and my chosen investment as well as all costs and charges and, where available, the Key (Investor) Information Document provided to me on paper or via www.hl.co.uk.

I confirm that to the best of my belief the information on this form is true and that this application form shall be the basis of the contract between me and HL. I will notify HL without delay of changes to these particulars. I have not received advice from HL regarding the suitability of the HL JISA or any aspect of this investment.

Instruction to your bank or building society to pay by Direct Debit – only complete if you're paying by Direct Debit

**HARGREAVES
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Please keep a copy of the Direct Debit guarantee which is in the Terms and Conditions.

Service User Number

8 3 7 0 0 4



Name(s) of
account holder(s):

Branch
Sort Code

Bank/Building Society
Account Number

Name and full postal address
of your Bank/Building Society

To the
Manager:

Address:

Postcode:

Please
sign here



SIGNATURE

Date:

JUNIOR ISA APPLICATION – QUESTIONS AND ANSWERS

Who is eligible for a Junior ISA?

A Junior ISA can be opened for a child if they:

- Live in the UK, and
- Are under 18

If your child has a Child Trust Fund, you'll have to transfer it to a Junior ISA first.

Who can apply for a Junior ISA?

Anyone with parental responsibility for the child can apply for an HL Junior ISA. They'll become the 'registered contact' who manages the account.

Remember, there can only be one registered contact at a time.

Who can pay money into a Junior ISA?

Once opened anyone can pay money into a Junior ISA, but only the registered contact can invest. Payments can be made as a lump sum by debit card/cheque or as a monthly saving using a Direct Debit.

We'll need to identify the person who's paying into the Junior ISA, we'll do this electronically. If the check isn't successful we'll be in touch.

Remember, any money added to the Junior ISA belongs to the child and can't be repaid.

What if my child needs extra support when they turn 18?

If the young person lacks mental capacity to access their Junior ISA, you will need to make an application to the Court of Protection to obtain authority to access this money on their behalf.

Some young people may only need support to deal with their finances, in which case they may be able to make a Lasting Power of Attorney, which will give you the authority to access the account for them. Acting as an appointee for benefits will not give you legal access to their ISA.

You can find out more information here:

www.gov.uk/making-financial-decisions-for-young-people.

Payment and investment details

Let us know what you want to invest in, and how much. If you're investing in funds please make sure you include both the name of the fund management company (e.g. Jupiter) and the name of your chosen fund (e.g. Global Strategic Bond).

Can I invest using a Direct Debit?

Yes, you can use a Direct Debit to invest directly into funds, FTSE 350 shares, and some investment trusts and ETFs – or to simply add cash to the account.

We take payments on the 7th of the month, with investments made on the 10th – or the next working day.

The cut off for Direct Debits to be started or cancelled is the 21st of each month.

How does the income instruction work?

Your income instruction tells us what you want us to do with any income your child's investments make. It applies to all investments in the Junior ISA.

If you leave the income instruction blank we'll look at what you've told us before. If you haven't given us an instruction any income will be kept as cash in the account.

If you buy funds we'll buy accumulation units where possible.

Reinvest income automatically

We'll reinvest income when it reaches £10 per holding. There's no charge for this service.

Hold income as cash in my child's Junior ISA
We'll hold any income in the account until you've decided what to do with it.

Making a payment by cheque?

Your cheque should be payable to 'HLAM Junior ISA Client A/C', with the child's name written on the back. We can't accept cheques made payable to the child.

If you're using a cheque that doesn't show your name (a building society cheque, for example) or if the child is paying, please ask your bank or building society to write on the back of the cheque 'This cheque has been drawn on the account of (your name/the child's name).' This must be dated, signed and show their company stamp.

How much does the HL Junior ISA cost?

Annual account charges

There are no charges for holding investments in the HL Junior ISA. This includes UK and overseas shares, investment trusts, exchange-traded funds, gilts, and bonds.

Dealing charges

There are no charges for holding investments in the HL Junior ISA online or through the app in the HL Junior ISA.

Other charges

The investments you choose may have their own charges such as charges from a fund manager. You can find these in an investment's key (investor) information document, so please read it closely.

Further information on all other charges can be found on the www.hl.co.uk/investment-services/junior-isa/savings-interest-rates-and-charges. Junior ISA charges page and in the tariff of charges in our terms and conditions.

Return your application form and cheque to:
Freepost HARGREAVES LANSDOWN

Any questions?

0117 980 9950

www.hl.co.uk

helpdesk@hl.co.uk

Don't want to hear from us?

If you don't want to get emails from us just reply to let us know.