

HL JUNIOR STOCKS AND SHARES ISA TOP UP FORM

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**

Return to our simple freepost address (no stamp needed): **Freepost HARGREAVES LANSDOWN**

AWJ13

Child's Details – the child is the owner of the investments held in this Junior ISA Office use only:

| | | | | | | | | | | | | | | | | | | | | |
|----------------------------|----------------|---|---|---|---|---|---|---------------------------|--|--|--|--|--|--|--|--|--|--|--|--|
| Title (Master, Miss, etc): | Full name: | | | | | | | | | | | | | | | | | | | |
| Postcode: | Date of birth: | D | D | M | M | Y | Y | Client number (if known): | | | | | | | | | | | | |

Your details

| | | | | | | | | | | | | | | | | | | | | |
|-----------------------|----------------|---|---|---|---|----------|---|---------------|--|--|--|--|--|--|--|--|--|--|--|--|
| Title (Mr, Mrs, etc): | First name(s): | | | | | Surname: | | | | | | | | | | | | | | |
| Address: | | | | | | | | | | | | | | | | | | | | |
| Postcode: | Date of birth: | D | D | M | M | Y | Y | Main tel. no: | | | | | | | | | | | | |
| Email address: | | | | | | | | | | | | | | | | | | | | |

Only complete if you're the registered contact for this Junior ISA – complete the next section if this doesn't apply to you

How much would you like to pay into the Junior ISA? – 2019/20 Junior ISA limit: £4,368

| | | |
|---|--|--|
| Lump sum: (min £100) | Your cheque should 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. | |

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

| Investment choice Full fund/share name | Lump sum (min. £100 per fund) | Monthly saving (min. £25 per investment) |
|---|----------------------------------|---|
| | £ | £ |
| | £ | £ |
| | £ | £ |
| | £ | £ |
| | £ | £ |
| | £ | £ |
| | £ | £ |
| Cash | £ | £ |
| Total | £ | £ |

If you'd like choose more investments, let us know on a separate sheet.

Declaration and signature – remember to include your cheque

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(s) including all costs and charges and, where available, the Key (Investor) Information Document provided to me on paper or via www.hl.co.uk. I understand that money subscribed to a JISA becomes property of the child and can't be repaid. I have not received advice from HL regarding the suitability of the HL JISA.

| | | | | | | | | |
|-------------------------|-----------|-------|---|---|---|---|---|---|
| Please sign here | SIGNATURE | Date: | D | D | M | M | Y | Y |
|-------------------------|-----------|-------|---|---|---|---|---|---|

Only complete if you're NOT the registered contact for this Junior ISA – remember you won't be able to choose the investments

How much would you like to pay into the Junior ISA? – 2019/20 Junior ISA limit: £4,368

| | | |
|---|--|--|
| Lump sum: (min £100) | Your cheque should 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. | |

Declaration and signature – remember to include your cheque

I have read, agreed to and retained the Terms and Conditions, Important Investment Notes and Key Features of the HL JISA. I acknowledge that money subscribed to a JISA becomes property of the child and can't be repaid. I understand this top-up will be held as cash on the account until the registered contact decides where they'd like to invest. I have not received advice from HL regarding the suitability of the HL JISA.

| | | | | | | | | |
|-------------------------|-----------|-------|---|---|---|---|---|---|
| Please sign here | SIGNATURE | Date: | D | D | M | M | Y | Y |
|-------------------------|-----------|-------|---|---|---|---|---|---|

Turn over for help or to complete the Direct Debit slip (if applicable)

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

**HARGREAVES
LANSDOWN**

**Please keep a copy of the Direct Debit guarantee which is in the Terms and Conditions.
Please complete using dark ink.**

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

Instruction to your Bank or Building Society –
Please pay Hargreaves Lansdown Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Hargreaves Lansdown and, if so, details will be passed electronically to my Bank/ Building Society.

Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

Date:

JUNIOR ISA TOP UP – QUESTIONS AND ANSWERS

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 does 'registered contact' mean?

This is the parent/guardian who looks after the Junior ISA and makes any investment decisions.

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).

Remember only the registered contact can choose where to invest.

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 is the 21st of each month.

Making a payment by cheque?

Your cheque should be payable to 'HLAM Junior ISA 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.

If you're topping up more than one Junior ISA, please send separate cheques and top-up forms.

Return your application form and cheque to:
Freepost HARGREAVES LANSDOWN

Any questions?

0117 980 9950

helpdesk@hl.co.uk

www.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.

MORE WAYS TO TOP UP A JUNIOR ISA

Online – visit www.hl.co.uk

By telephone – call **0117 980 9950**

Before applying make sure you have your (and your child's if they have one) National Insurance Number to hand, and you've read the Key Features and Terms and Conditions.

Telephone lines are open Monday – Thursday: 8am – 7pm,
Friday: 8am – 6pm and Saturday: 9:30am – 12:30pm.

