



PORTFOLIO JUNIOR ISA APPLICATION FORM

Before completing this form please ensure you have read the Portfolio Junior ISA Terms and Conditions. It is important to complete this form as far as possible as we can only act in accordance with the information provided. Incomplete information may lead to being unable to complete the account opening process properly.

Please complete ALL Sections of this form and ensure it is signed by the Registered Contact.

Section 1 – Personal Details of the Registered Contact (Applicant)							
Mr/Mrs/Miss/Ms/Title							
Surname							
Forename(s)							
Address							
Postcode							
Date of Birth							
Email Address							
Current JBS Account Number (if applicable)	C						

Section 2 – Personal Details of the Eligible Child							
Master/Miss							
Surname							
Forename(s)							
Address							
Postcode							
Date of Birth							
National Insurance No. (if child over 16)							
<input type="checkbox"/> UK Resident or <input type="checkbox"/> Crown Employee or Dependent/Spouse of Crown Employee							
<i>Note: The Eligible Child will need to be verified by provision of a valid Passport or Birth Certificate</i>							

IMPORTANT INFORMATION

The value of tax saving and eligibility to invest in a JISA will depend on individual circumstances and tax rules may change in the future. Before committing yourself to a JISA you may wish to take qualified independent advice.

Investing in stockmarket based investments may not be right for all investors. You should consider carefully and/or seek professional guidance before investing.

Please remember that past performance should not be seen as a guide to future performance. The value of an investment and any income from it can fall as well as rise as a result of market movement and you may not get back the amount originally invested. You could get back nothing at all.

Section 3 – Declaration and Registered Contact Signature

The Eligible Child will remain the beneficial owner of this Junior ISA and I declare that:

- I am 16 years of age or over and:
 - am the Eligible Child; or
 - I have the parental responsibility for the Eligible Child under this application.
- As the Applicant I apply to open a Junior ISA for the Eligible Child who does not currently have a Child Trust Fund within the meaning of the Child Trust Funds Act 2004.
- I will be the Registered Contact for this Junior ISA.
- The Eligible Child:
 - is resident in the United Kingdom; or
 - has general earnings from overseas Crown employment subject to United Kingdom tax within the meaning given by section 28 of the Income Tax (Earnings and Pensions) Act 2003; or
 - is married to or in a civil partnership with a person who has general earnings from overseas Crown employment subject to United Kingdom tax within the meaning given by section 28 of the Income Tax (Earnings and Pensions) Act 2003; or
 - is a dependent of a person who has general earnings from overseas Crown employment subject to United Kingdom tax within the meaning given by section 28 of the Income Tax (Earnings and Pensions) Act 2003.
- I understand that this application is to open a stocks and shares Junior ISA only.
- In respect of this stocks and shares Junior ISA application:
 - I have not and will not subscribe to another stocks and shares Junior ISA in the name of the Eligible Child in this application.
 - I am not aware of any other stocks and shares Junior ISA in the name of the Eligible Child in this application.
- As far as I am aware I have not subscribed amounts to this or any other Junior ISA arrangements which when aggregated exceed the annual subscription limit for the Eligible Child in this application in the year this application is made.
- I will not knowingly exceed the annual Junior ISA subscription limit in this year or any subsequent years.
- I authorise James Brearley & Sons:
 - to hold the Eligible Child’s cash subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
 - to make on the Eligible Child’s behalf any claims to relief from tax in respect of Junior ISA investments.
- The information given by me is correct to the best of my knowledge and I will inform James Brearley & Sons of any changes to the information contained herein.

I confirm that I have read and understood the terms and conditions detailed in the Service, Terms and Conditions.
I also confirm that information contained in this form is accurate'

Signature of Registered Contact	
---------------------------------	--

Date	
------	--

HEAD OFFICE
 PO Box 34, Walpole House, Unit 2, Burton Road, Blackpool, FY4 4WX
 Tel: 01253 831100 / Fax: 01253 831102