

The Oddfellows Junior ISA Application form

Please note: the person who applies must be aged 16 or over and have parental responsibility for the child.

I apply to open a Junior ISA for:

(PLEASE USE BLOCK CAPITALS)

1. Child's details

Child's Title Surname Forename (s)

Child's Address

Town/City Postcode

Child's Date of birth

D	D
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M	M
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Y	Y	Y	Y
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 Gender

F

M

 (please tick)

Child's National Insurance Number(if known)

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The child named above will be the beneficial owner of the account investments.

2. Your details - Registered Contact

Title Surname Forename (s)

Address

Town/City Postcode

Date of birth

D	D
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M	M
---	---

Y	Y	Y	Y
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 Tel No

Email

3. Investment amount - How much do you wish to invest in your child's Junior ISA?

a) Regular payments by Direct Debit

The minimum amount you can invest in our Junior ISA is £10 per month, with the maximum amount you can invest in a Junior ISA being £4,128 in a tax year (as at 2017-18).

£

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 Monthly/Yearly (delete as applicable)

Please complete the Direct Debit instruction to allow us to collect your payments. Payments will be collected on or shortly after the first of each month. Oddfellows will not collect payments until all processing and recording has been completed. Only the agreed payments will be deducted from your Bank/Building Society account.

Direct Debit payer details (if different to the person applying in section 2)

PLEASE PROVIDE CONFIRMATION OF RECEIPT TO:

Title Surname Forename (s)

Address

Town/City Postcode

Continued overleaf

3. Investment amount (Continued)

b) Lump sum payment by cheque into the Junior ISA

The minimum amount you can invest in our Junior ISA is £10 per month, with the maximum amount you can invest in a Junior ISA being £4,128 in a tax year (as at 2017-18).

£ Please make cheques payable to 'The Oddfellows' and return with this form.

If the cheque is from someone other than the Registered Contact (Section 2) and a receipt is required, please provide contact details.

Title Surname Forename (s)

Address

Town/City Postcode

4. Declaration

I apply to open an **Oddfellows Junior ISA**.

I declare that:

- I am 16 years of age or over
- I have parental responsibility for the child/I am the child (delete which does not apply)
- I/The child does not have a Child Trust Fund account
- I will be the registered contact for the Junior ISA
- The child is a resident and ordinarily 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 have not subscribed and will not subscribe to another Junior ISA of this type for this child
- I am not aware that this child has another Junior ISA of this type
- I am not aware of other Junior ISA subscriptions that will result in this child exceeding the annual limit
- I will not knowingly make subscriptions to Junior ISAs for this child that will result in the subscription limit being exceeded

I authorise the Oddfellows:

- to hold the child's subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash and;
- to make on the child's behalf any claims to relief from tax in respect of Junior ISA investments.

I confirm that:

- I understand that I have received no advice from you and have decided to invest based on the information provided in your Key Facts Document;
- I understand the charges associated with this product;
- I am comfortable with the level of risk associated with this product, and that my investment could increase or decrease in value, and that the child could get back less than I paid in; and
- I understand that the past investment performance of this product is not a guide to future performance.

I agree to the Junior ISA Terms & Conditions and confirm that to the best of my belief the information in this form is true.

Signature:

Date:

5. Data Protection

The information you provide us with will be held by the Society. It will be used for setting up and administering your Account. We may be required by law to disclose information regarding you or your Account to the regulatory authorities. We will not share your information with other third parties for marketing purposes. We may contact you in the future by post, email or telephone regarding your investment, financial and insurance needs. Tick this box if you do not wish to receive information on future promotions. ☐

**Return completed form to freepost address: FREEPOST ADMINISTRATION OFFICE
(no further address details are required)**