

# Junior Individual Savings Account



## Application Form

Please read the Key Information Document and Important Information section before completing this form. Please return your completed form to Foresters Friendly Society to proceed with your application.

### FOR OFFICE USE ONLY

Staff/FA/Int Name

Contact/FA/Int Number

Marketing Code

## 1. Your details

Title  Mr  Mrs  Miss  Ms  Other

First name

Home telephone

Middle name(s)

Mobile telephone

Last name

Email

Date of birth

Address

Postcode

If relevant, preferred branch no.

You must be the child's parent, guardian or person with parent responsibility to open this policy. Another relative or friend can make lump sum or regular payments, please ensure they complete their details in Section 5 and the Direct Debit Instruction in Section 8.

If you are aged 16 or 17 and opening a Junior ISA for yourself, please complete this section and not the Child's Details section below. Please also complete your National Insurance number in the box below.

National Insurance number

(Only complete this box if you are aged 16 or 17 and opening this JISA for yourself)

## 2. Child's details

Title

Child's first name

Middle name(s)

Last name

Address (if different from yours)

Date of birth

Postcode

If relevant, preferred branch no.

National Insurance number

(Only required if the child is over 16 and has one. Not needed if the child is under 16)

### 3. Transfer applications

If you wish to transfer an existing Junior ISA or CTF to Foresters Friendly Society, please also complete a Junior ISA Transfer Request form. These are available by calling 0800 783 4162 or at [www.forestersfriendlysociety.co.uk](http://www.forestersfriendlysociety.co.uk).

I apply to transfer an existing Junior ISA/CTF

### 4. How much do you want to invest into your child's Junior ISA?

**A. Lump Sum Investment:** Please tick one box only to inform us how much you want to invest

£4,260   
  £3,000   
  £2,000   
  £1,000   
  £500   
 Other £  (Minimum £500, maximum £4,260 – tax year 2018/2019)

I enclose my cheque made payable to 'Foresters Friendly Society'

**OR** Please contact me to arrange payment by Debit Card.

**B. Monthly Contributions** (please complete section 6):

£355 per month   
  £250 per month   
  £150 per month   
  £100 per month   
  £25 per month   
  £10 per month

Other £  (Minimum £10, maximum £355 – tax year 2018/2019)

### 5. Payer details (if not the person setting up the plan)

Title   
  Mr   
  Mrs   
  Miss   
  Ms   
 Other

First name     Middle name(s)

Last name     Date of birth 

 D  D  M  M  Y  Y  Y  Y

Address

Postcode     Telephone

Email

## 6. How we will use your data

The information that you provide on this form will be held by Foresters Friendly Society and used to set up and administer the policy for which you are applying and for other business purposes. Further information about how we hold and use your personal information is available on our website ([www.forestersfriendlysociety.co.uk/privacy-policy](http://www.forestersfriendlysociety.co.uk/privacy-policy)).

Where an application is made via a Financial Adviser (FA), you agree to your details being disclosed to that FA until you instruct us otherwise.

We (Foresters Friendly Society, including your Branch) would like to provide you with information about products, services and events which may be of interest to you. To consent to receive this, please select your preferred option(s) below:

Post  Email  Text Message (SMS)  Phone

You can update your preferences at any time by calling 0800 783 4162, emailing [memberservicesforestersfriendlysociety.co.uk](mailto:memberservicesforestersfriendlysociety.co.uk), completing the online form available at [www.forestersfriendlysociety.co.uk/contactpreferences](http://www.forestersfriendlysociety.co.uk/contactpreferences) or writing to us at: Foresters Friendly Society, 29-33 Shirley Road, Southampton SO15 3EW.

From time to time, carefully selected third parties that Foresters Friendly Society work with may like to contact you about products, services and events which may be of interest to you. To consent to receive this, please select your preferred option(s) below:

Post  Email  Text Message (SMS)  Phone

As above, you can update your preferences at any time via the methods provided.

## 7. Money laundering regulations

To comply with anti-money laundering requirements, we may verify your identity by carrying out an online check with a credit agency. The agency will add a note to your reference file to show that an identity check has been made. We may pass information to third parties for the prevention of crime or detection of fraud or where required by law or regulation. Money laundering checks will take place if you invest a lump sum of £10,000 or more, or your total investment with Foresters Friendly Society exceeds £10,000. Please complete this section if this applies to you.

Employment status: (e.g. employed, self employed, unemployed etc)

The source of the single premium to be invested in this policy (e.g. inheritance, divorce settlement, property sale, etc.)

Previous address (if you have changed address in the last 3 months)

  
  
  


## 8. Instruction to your Bank or Building Society to pay by Direct Debit



### To The Manager

Name and full address of your Bank/Building Society branch.

  
  
  
  

Name(s) of Account Holder(s)

  

Sort Code

 -   - 

Account number

     

Originator's Identification Number

 9  1  5  6  4  9

Reference Number (office use only)

         

### Instruction to your Bank or Building Society

Please pay Foresters Friendly Society 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 Foresters Friendly Society and, if so, details will be passed electronically to my Bank/Building Society.

Signature

Date

Signature

Date

Banks/Building Societies may decline to accept instructions to pay Direct Debits from some types of account, such as a savings account.

## 9. The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Foresters Friendly Society will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Foresters Friendly Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Foresters Friendly Society or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Foresters Friendly Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written notification may be required. Please also notify us.

## 10. Declaration

This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information.

I declare that:

I apply to subscribe to a Foresters Friendly Society Junior ISA for the current tax year and each subsequent year until further notice.

All subscriptions made, and to be made, belong to the Named Child.

I declare that:

- I am 16 years of age or over.
- I am the child/I have parental responsibility for that 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 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 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.
- 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 Foresters Friendly Society:

- To hold my cash subscription, other proceeds in respect of my Junior ISA investments and any other cash; and
- To make on my behalf any claims to relief from tax in respect of JISA investments.

I declare that to the best of my knowledge and belief, the statements provided on this form are true and correct. I have read and understood the JISA Key Information Document and Important Information section.

I understand that all correspondence relating to the plan will be sent to me as the Registered Contact until the Named Child's 16th birthday, and will be sent to the Named Child after their 16th birthday.

I understand that the Named Child will be entitled to Foresters Friendly Society surplus in the event of the closure of the Society only after having been a member for 5 years. I understand that a copy of the Rules and Memorandum are available upon request.

I confirm that I have not been given advice by Foresters Friendly Society in relation to the purchase of this plan.

Signature

Date

# Apply now to invest in their tomorrow, today

## Send your completed application form to:

Foresters Friendly Society  
FREEPOST RLST-SJZE-BACC  
29-33 Shirley Road  
Southampton  
SO15 3EW

**Telephone: 0800 783 4162**

**Visit: [www.forestersfriendlysociety.co.uk/JISA](http://www.forestersfriendlysociety.co.uk/JISA)**

**Email: [memberservices@forestersfriendlysociety.co.uk](mailto:memberservices@forestersfriendlysociety.co.uk)**

Monday - Friday, 9am - 5pm (excluding Bank Holidays)

Information, including a copy of this document, is available in large print, audio and Braille upon request.

Foresters Friendly Society is the trading name of The Ancient Order of Foresters Friendly Society Limited which is an Incorporated Friendly Society (Registration No. 511F) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Registration No. 110029).