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## Application Form – Junior Individual Savings Account

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### Stocks and shares - 2019/2020 (investment limit £4,368)

**IMPORTANT** if a child holds a child trust fund, it must be transferred as part of this application. A child cannot have a child trust fund and a junior individual savings account.

Please print clearly in block capitals

#### Type of Advice

Discretionary Managed

Dealing with Advice

Execution Only

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#### Data Protection

All information provided on this form will be processed in line with Vartan Ravenscroft's Data Protection Policy contained in Vartan Ravenscroft's Terms and Conditions.

Ravenscroft is a trading name of Ravenscroft Limited (RL) and is a wholly owned subsidiary of Ravenscroft Holdings Limited (RHL).  
For further details, including Legal and Regulatory Information, please refer to our Terms of Business or visit our website [www.ravenscroftgroup.com](http://www.ravenscroftgroup.com).

### Child's Details

Title

Full forename(s)

Surname

Permanent residential address

Postcode

Date of birth

If the child is aged 16 years or over, please provide their National Insurance (NI) No.

You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue and Customs, a letter from DWP or pension order book

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

### Parent/Guardian's details

You must be the **'registered contact'** for this Junior ISA to complete this form.

Title

Full forename(s)

Surname

Date of birth

Email address

Daytime telephone number

Permanent residential address

## Subscriptions and Income instruction

The investment limit for 2019/2020 is £4,368 for a Junior ISA.

The initial lump sum subscription with your application should be made by cheque, which must be from an account in the 'registered contacts' name. Please make the cheque payable to Pershing Securities Limited.

All further subscriptions may be made by cheque or BACS. Please contact Vartan Ravenscroft for further information.

For Junior ISA accounts we are also able to accept contributions from third parties. Lump sum payments can be made by cheque, payable to Pershing Securities Limited and the cheques should be issued from their personal or joint bank account.

If an income paying fund is chosen, dividends will be reinvested into the account.

## Bank account details

**IMPORTANT** The bank account details must match those of the registered contact.

Name of Bank/Building Society

Account name

Bank/Building Society account number

Bank/Building Society sort code

Bank/Building Society address

Postcode

I wish to subscribe to the JISA for 2019/2020 tax year:

£

## Declaration

### I declare that

- The child named above will be the beneficial owner of this account.
- I am 16 years of age or over.
- I am the child or I have parental responsibility for the child under this application.
- The child does not hold a Child Trust Fund or has transferred the CTF as part of this application.
- I will be the Registered Contact for the Junior Stocks & Shares ISA.
- The child is a resident and ordinarily resident in the UK, or is a UK Crown servant or is a dependant of a UK Crown servant or is married to a / in a civil partnership with a UK Crown servant.
- I have not and will not subscribe to another Stocks and Shares Junior ISA account for this child.
- I am not aware of any other Stocks and Shares Junior ISA account for this child.
- I am not aware of other subscribed amounts to this or any other Junior ISA accounts which when aggregated exceed the annual subscription limit for this child.
- I will not knowingly exceed the applicable annual Junior ISA subscription limit in this year or any subsequent years.
- **I authorise Pershing Securities Limited**
  - (i) to hold the Child's cash subscription, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
  - (ii) to make on the Child's behalf any claims to relief from tax in respect of Junior ISA investments

I have read and agreed to and retained the Vartan Ravenscroft's Terms and Conditions provided to me. If you do not understand any point please contact us for further information.

I declare to the best of my knowledge the information on this form is true and this form shall be the basis of a contract between me and Vartan Ravenscroft. I will inform Vartan Ravenscroft without delay of any changes to these particulars.

I am the named parent/guardian/registered contact on page 2/or the child named on page 2 if over 16 and I agree to the declaration stated above (please delete as appropriate).

Signature

Full name (block capitals)

Date

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**Disclaimer**

Vartan Ravenscroft is a trading name of A Vartan Limited (“AVL”) (FCA number 609277) whose registered office address is at The Singing Men’s Chambers, 19 Minster Precincts, Peterborough, PE1 1XX. AVL is authorised and regulated by the Financial Conduct Authority. All calls to AVL will be recorded and monitored for training and security purposes.

Ravenscroft is a trading name of Ravenscroft Limited (“RL”) (company number 42906) and Ravenscroft Investment Management Limited (“RIML”) (company number 49397) both of which have their registered office addresses at P.O. Box 222, 20 New Street, St Peter Port, Guernsey, GY1 4JG. The business address for Ravenscroft Limited Jersey office is PO Box 419, First Floor, Weighbridge House, Liberation Square, St Helier, Jersey JE2 3NA.

RL is licensed and regulated by the Guernsey Financial Services Commission to conduct investment business and the Jersey Financial Services Commission to conduct investment and funds services business.

Ravenscroft Investment Management is a trading name of RIML. RIML is licensed and regulated by the Guernsey Financial Services Commission to conduct investment business.

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**t 01733 315 155 f 01733 346 555**

**The Singing Men’s Chambers, 19 Minster Precincts, Peterborough, PE1 1XX**

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