

# Pilling & Co Stocks & Shares Junior ISA Application

Tax Year 2017/18

I wish to open an Execution Only JISA

or

a Managed JISA

Title  First Names (in full)

Surname

Permanent Residential Address   
Postcode

Date of Birth  NINO

Tel:- Daytime  Mobile

E-Mail

You must supply an email address to receive your statements, valuations, contracts and newsletters on-line. Instructions will be sent to this email address on how to set up your Client Web Access (CWA). If you do not have access to a computer or an email address, paper versions are available by ticking this box.

## I apply to open a Junior ISA (JISA) for :-

Child's title  Child's First Names

Child's Surname

Permanent Residential Address (if different to above)   
Postcode

Child's Date of Birth  Child's NINO (if applicable)

## I wish to open a Pilling & Co Stocks and Shares JISA and subscribe as follows:

I enclose a cheque payable to Pilling & Co for £   
 I understand I may invest up to £4128 including dealing costs

I enclose share certificate(s) or shareholding statement for a "BED & JISA" together with the appropriate signed transfer form(s) one form per stock (A cheque to cover costs can be included, payable to Pilling & Co)

PLEASE NOTE :- For us to accept instructions on this account from someone other than the registered contact (eg. Spouse, partner etc.) please enclose a signed letter of authority with this form.

# JISA 2017/18 APPLICATION FORM

## I DECLARE THAT :-

- I am 16 years of age or over.
- I am the child/ I have parental responsibility for that child. **(delete as appropriate)**
- I/ the child does not have a Child Trust Fund (CTF) 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 relationship 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 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 Pilling & Co Stockbrokers Ltd to hold the child's subscriptions, JISA 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 JISA investments.
- I agree to JISA and Pilling & Co Stockbrokers Ltd's Terms & Conditions and confirm that to the best of my belief the information on this form is true.
- I understand that on my 18th birthday, without reference to the child/me, the JISA will automatically become an ISA and will attract the charges associated with a Pilling ISA.

SIGNED

DATE

**Please note:-** If you have selected our Managed JISA the funds will automatically be invested. However, if you have selected our Execution Only JISA, you need to complete the following:-

**For Execution Only JISAs only**

<b>Dividends</b> (please tick)
I wish to elect for the "DRIP" scheme <input type="checkbox"/> (please see details in the brochure)

To invest the JISA straight away in investments of your choice, please write below your investment choice(s) and the amount(s) to be put into each security (or only one if you prefer).

Name of Security	No of Shares	Invest £ ? Cash

Please return this form to: -

Pilling & Co Stockbrokers Ltd Henry Pilling House, 29 Booth Street, Manchester. M2 4AF