

# Stocks & Shares Junior ISA (JISA) Application Form Tax Year 2026/27

PILLING & Co

## INSTRUCTIONS

Please complete this form using BLOCK CAPITALS in black ink.

Send signed paper forms and a cheque if required to:

**Pilling & Co, Henry Pilling House, Booth Street, Manchester, M2 4AF.**

Send signed scanned / photographs (*all pages of the form*) to: [info@pilling.co.uk](mailto:info@pilling.co.uk) or your usual Pilling contact.

## APPLICANT DETAILS

Title ..... First Name(s) (*in full*) .....

Surname ..... Existing Pilling Account Number .....

Date of Birth ..... / ..... / ..... National Insurance Number .....

Permanent Residential Address .....

..... Postcode .....

Primary Telephone ..... Secondary Telephone .....

Email Address <sup>1</sup>.....

<sup>1</sup> If you have provided an email address, your account will be set up by default for online statements, valuations, contract notes and newsletters. You will receive an email with instructions to activate your online access.

If you have not provided an email address, these documents will be sent via post. Note that this may incur a higher custody charge.

## CHILD'S DETAILS

I apply to open a JISA for myself (*proceed to the JISA Type section*)

I apply to open a JISA for:

Title ..... First Name(s) (*in full*) .....

Surname ..... Date of Birth ..... / ..... / .....

National Insurance Number (*if known*) .....

Permanent Residential Address .....

..... Postcode .....

Primary Telephone ..... Secondary Telephone .....

Email Address .....

*continue overleaf...*

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**JISA TYPE**

- I wish to open an Execution Only JISA (*you will make your investment decisions*)
- I wish to open a Managed JISA (*Pilling & Co will automatically invest into our 'stakeholder' fund*)
- I wish to open a Discretionary Managed JISA (*Pilling & Co's bespoke management of your portfolio* <sup>2</sup>)

<sup>2</sup> Minimum portfolio sizes apply, please see our Discretionary Management Brochure for further details.

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**FUNDS**

Please note that you may subscribe up to **£9,000** in the current tax year.

How would you like to provide funds? (*please tick all that apply*)

- I enclose a cheque made payable to 'Pilling & Co'.
- I wish to contribute funds from an existing Pilling account (*please provide details separately*)
- I have/will make a bank transfer payment for £..... to fund this service <sup>3</sup>.
- I wish to transfer assets from another broker (*please complete our JISA Transfer Request form*).

<sup>3</sup> Payments should be made payable to:

*HSBC Bank / Pilling & Co Client Free Money / Account Number: 83692450 / Sort Code: 40-05-30*  
*Please use your client account number as reference, or your name if you are a new client.*

Source of Funds (*i.e. employment, pension, asset sales etc.*) .....

I expect to trade ..... times per week/month/quarter/year (*please delete as appropriate*)

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**INVESTMENTS (EXECUTION ONLY JISA)**

For your Execution Only JISA to be invested straight away, please write below your investment choice(s) and the amount(s) to be put into each stock/security.

<b>Name of Stock/Security</b>	<b>Quantity or Value (£)</b>	<b>KID <sup>4</sup></b>
.....	.....	<input type="checkbox"/>
.....	.....	<input type="checkbox"/>
.....	.....	<input type="checkbox"/>

<sup>4</sup> For Investment/Unit Trust purchases investors must confirm that they have read the Key Information Document (KID) or Key Investor Information Document (KIID) before we can proceed with the investment. Tick to confirm that you have read the KID/KIID

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**INCOME**

How would you like your income treated? (*please tick one*)

- I wish to retain any income as cash on deposit in my Pilling & Co JISA.
- I wish to reinvest income using the Pilling Dividend Reinvestment Plan (*commission of 0.5% per reinvestment applies*).

DECLARATIONS

I declare that:

- ✓ I am 16 years of age or over.
- ✓ I am either the child or I have responsibility for the child.
- ✓ I will be the registered contact for this JISA.
- ✓ I confirm that the child is a UK resident for tax purposes, or performs duties in the UK, or is married to/in a civil partnership with a Crown employee whose duties are treated as being performed in the UK under section 28 of the Income Tax (Earnings & Pensions) Act 2003. I will notify Pilling & Co if the child's residency status or circumstances change.
- ✓ I confirm that the child is not a US person, resident, or green card holder.
- ✓ The child does not have an existing Stocks & Shares JISA or Child Trust Fund (CTF) account.
- ✓ All JISA subscriptions made or to be made are solely on the child's behalf.
- ✓ The child has not exceeded, and will not exceed, the overall JISA subscription limit within the same tax year or subscribe to another JISA of this type.
- ✓ I understand that on the child's 18<sup>th</sup> birthday, this JISA will automatically become an ISA and will attract the charges associated with a Pilling ISA.
- ✓ To the best of my knowledge, the information provided in this form is accurate. I will inform Pilling & Co of any changes that may affect this information.
- ✓ I have read, understood, and agree to the terms of this service as outlined in the JISA Brochure and the General Terms & Conditions of Business. I acknowledge that these terms may be updated to reflect regulatory changes.

AUTHORISATIONS

I authorise Pilling & Co Stockbrokers Ltd:

- ✓ To hold my cash subscriptions, JISA investments, interest, dividends, and any other rights or proceeds from those investments and any other cash. I also understand that if I were to have overseas investments, my assets may be deposited in non-UK jurisdictions where my rights and protections may be reduced.
- ✓ To make any claims for me to relief from tax in respect of JISA investments.
- ✓ On my written request, to transfer (*in full or in part*) any JISA investments, interest, dividends, rights, other proceeds, or cash held in my account, to be completed within a reasonable period required by Pilling & Co for processing, not exceeding 30 days.
- ✓ To hold my investments in CREST, where possible, in the name of St Anns Square Nominees Limited.

PLEASE SIGN HERE

Name ..... Signature ..... Date ..... /..... /.....

This application is valid for subscriptions made to a Pilling & Co Stocks & Shares JISA in this and any future tax years.

**Please Note:** For us to accept instructions on this account from a third party (*e.g. parent, grandparent etc.*) please enclose a third party authority form with this form, unless a third party authority is already in place.

