

PHILIP J MILTON & COMPANY Plc

JUNIOR ISA APPLICATION FORM

MODEL

A	B	C	D
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Please complete and return this form to Philip J Milton and Company Plc, Choweree House, 21 Boutport Street, Barnstaple, Devon EX31 1RP.
All sections need to be completed.

Section One - a) Personal Details and Legal Requirements – Account Holder (Child)

Please note that all correspondence will be sent to the Registered Contact

For an existing Philip J Milton & Company Plc Junior ISA, please quote your A/C No:

Title (Mr/Mrs/Miss/other) Forenames

Surname

Permanent Residential Address Post Code

Do you have a National Insurance No.? Yes No This information is mandatory for children over 16

If Yes: you MUST enter it here: Date of Birth

b) Personal Details and Legal Requirements – Registered Contact (Parent/Guardian)

Title (Mr/Mrs/Miss/other) Forenames

Surname

Permanent Residential Address Post Code

Contact Telephone No. (In case of query) Date of Birth

National Insurance No. This information is mandatory for the Registered Contact

Section Two - Subscription

Lump-Sum

I apply to subscribe £
for the tax year e.g. 2017/18

Monthly Savings

I apply to subscribe £
for the tax year e.g. 2017/18

THIS APPLICATION IS FOR LUMP SUM AND/OR REGULAR SAVINGS' SUBSCRIPTIONS TO A JUNIOR ISA FOR THE TAX YEAR STATED AND EACH SUBSEQUENT TAX YEAR, UNTIL FURTHER NOTICE.

Section Three - Declaration and Authority

I declare that:

- I am 16 years of age or over and:
 - (i) am the Eligible Child; or
 - (ii) I have parental responsibility for the Eligible Child under this application.
- I will be the registered contact for the Junior ISA.
- As the applicant, I apply to open a Junior ISA for an Eligible Child, who does not qualify as an "Eligible Child" within the meaning of the Child Trust Funds Act 2004.
- The Eligible Child:
 - (i) does not have a Child Trust Fund account (available for children born between 1 September 2002 and 2 January 2011) or if they do, this will be transferred into a JISA before any new investments into the JISA can be made.
 - (ii) is resident in the UK; or
 - (iii) is a UK Crown servant, a dependant of a UK Crown or is married to/in a civil partnership with a UK Crown servant.
- In respect of the Junior ISA account application:
 - (i) I have not subscribed and will not subscribe to another Junior ISA of this type in the name of the Eligible Child in this application
 - (ii) I am not aware that this child has another Junior ISA of this type.
- As far as I am aware, I have not subscribed amounts to this or any other Junior ISA accounts which when aggregated exceed the annual subscription limit for the Eligible Child in this application in the year this application is made.
- I will not knowingly exceed the applicable annual Junior ISA subscription limit in this year or any subsequent years.

I hereby authorise Philip J Milton & Company Plc acting directly or through any appointed nominee:

- to hold the child's subscription, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- to make on the child's behalf any claims to relief from tax in respect of Junior ISA investments; and
- on my written request to transfer or pay the child, as the case may be, Junior ISA investments, interest, dividends, rights or other proceeds in respect of such investments or any cash, subject to the agreed time constraints once the child has attained the age of 18 or over.

I apply to subscribe to the Philip J Milton & Company Plc Junior ISA and agree to the terms and conditions. I confirm that this form has been completed to the best of my knowledge and belief and I will notify Philip J Milton & Company Plc of any changes to the information without delay.

SIGNATURE OF REGISTERED CONTACT

DATE

X

The personal information given on this form will be held by Philip J Milton & Company Plc within computer or manual systems and will assist in providing the service for which you have applied. The use of your personal information is covered by Philip J Milton & Company Plc's registration under the Data Protection Acts 1984 and/or 1998, as applicable. Under the terms of the Act you have the right, upon payment of the appropriate fee, to obtain a copy of the information held.

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