

JUMP JUNIOR ISA (JISA) APPLICATION FORM

Mandatory fields marked with*

Please complete this form in BLOCK CAPITAL letters, sign and return it to Jump, PO Box 10828, Chelmsford, CM99 2BN. Please read this form in conjunction with the Jump Important Information & Terms and Conditions, the Witan Key Information Document and the pre-sale (ex-ante) cost disclosure.

1. Your Personal details

Your title*	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other title <input type="text"/>					
First name*	<input type="text"/>									
Surname*	<input type="text"/>									
Mother's maiden name* (required for security purposes)	<input type="text"/>									
Your date of birth*	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Your permanent home address* House number or name*	<input type="text"/>									
Address details*	<input type="text"/>									
	<input type="text"/>									
Postcode*	<input type="text"/>		Daytime telephone number*	<input type="text"/>						
Email address*	<input type="text"/>									
Place of birth*	<input type="text"/>			Nationality*	<input type="text"/>					
National Insurance Number*	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>					
If you are an existing Jump customer please enter your account number	<input type="text"/>									

2. I apply to open a stocks and shares JISA for*

- A child (Please complete section 3) or Myself
- If you are opening the account for a child, please confirm you are the parent or Legal Guardian

3. Child's details

Title*	<input type="text"/>									
Child's first name*	<input type="text"/>									
Child's surname*	<input type="text"/>									
Child's permanent home address* House number or name* (if different to that in section 1)	<input type="text"/>									
Address details*	<input type="text"/>									
	<input type="text"/>									
	<input type="text"/>									
	<input type="text"/>									
Child's date of birth*	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child's National Insurance Number* (if they have one)	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>					

4. IFA (Independent Financial Adviser) Use Only

IFA FCA code	<input type="text"/>
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5. Your preferences*


- I would like to pay my Annual Management Fee:
By direct debit (please complete section 7) **or** for Witan Investment Services to sell my shares to cover the fee
- I would like to receive the Annual & Half Year Reports:
By post **or** By email notification

6. Your instruction - Please instruct how you would like to invest*

Value £	<input type="text"/>	Lump Sum (Min £250)	£	<input type="text"/>	Regular Sum (Min £50)
Please enclose a cheque made payable to Jump Savings Client a/c.			Your bank account will be debited on the 15th day of the month or next working day thereafter.		
For Regular Sum - please advise frequency of payments required: Monthly <input type="checkbox"/> or Quarterly <input type="checkbox"/>					

Please note more than one person can contribute to the JISA account; however the total investment must not exceed £4,260 per annum for the 2018/19 tax year.

7. Direct Debit Details - Please complete this to set up regular payments and/or your Annual Management Fee

Witan Investment Services Limited	Instruction to your bank or building society to pay by Direct Debit	
Please fill in the form and send to: Jump, PO Box 10828, Chelmsford CM99 2BN.		
Name and full postal address of your bank or building society		
To: The Manager	Bank/building society	Service user number <input type="text" value="6"/> <input type="text" value="9"/> <input type="text" value="8"/> <input type="text" value="4"/> <input type="text" value="4"/> <input type="text" value="1"/>
Address		Reference <input type="text"/>
Postcode		Instruction to your bank or building society. Please pay Witan Investment Services Limited 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 Witan Investment Services Limited and, if so, details will be passed electronically to my bank/building society.
Name(s) of account holder(s) <input type="text"/>		Signature(s) <input type="text"/>
Branch sort code <input type="text"/>	Bank/building society account number <input type="text"/>	Date <input type="text"/>
Banks and building societies may not accept Direct Debit Instructions for some types of account.		
DDI5		

8. Declaration*

I declare that:

- **I have read and acknowledge the most recent version of the Witan Key Information Document and the pre-sale (ex-ante) cost disclosure.**
- I am 16 years of age or over.
- I am the child/I have parental responsibility for that child.
- I/the child does not have a Child Trust Fund account.
- I will be the registered contact for the Junior ISA ("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 stocks and shares JISA for this child.
- I am not aware that this child has another stocks and share JISA.
- I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit of £4,260 for the 2018/19 tax year.
- I will not knowingly make subscriptions to JISAs for this child that will result in the £4,260 subscription limit for the 2018/19 tax year being exceeded.
- I authorise Witan Investment Services:
 - to hold, or arrange a suitable third party to hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;
 - to make on the child's behalf any claims to relief from tax in respect of JISA investments.
- I agree to be bound by the **Jump Important Information & Terms and Conditions** and will promptly inform you of any changes in my circumstances.
- I understand that this application is subject to acceptance by Witan Investment Services.
- I declare that the statements completed on this application are true to the best of my knowledge and belief.

Signature*

Date*

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Witan Investment Services would like to keep you updated about their services or products. Please confirm your consent to receiving the following, by email, for Witan Investment Trust⁽¹⁾:

Company Updates, Newsletters and product offers & promotions

(1) By consenting to receive emails about Witan Investment Trust, you acknowledge that we will process your personal data (including your name and email address) for the purpose of sending you these emails. You may withdraw your consent at any time by following the unsubscribe instructions included in every email communication.

For further information on the processing of your personal data by Witan, please see Witan's Privacy Policy at: <https://www.witan.com/legal-information>.