

Registered contact change request form

This form lets you change a registered contact for an AJ Bell Junior ISA.

Before completing this application, you should read the AJ Bell terms and conditions, available on our website ajbell.co.uk.

Please use blue or black ink and BLOCK CAPITALS only, ticking the boxes where appropriate.

If you'd like a copy of this, or any other item of our literature, in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at help@ajbell.co.uk.

Please sign and date this application form and return it to

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Child's details

Title

Surname

Forename(s)

Date of birth

National Insurance number

Account number

Existing registered contact details

Title

Surname

Forename(s)

Date of birth

National Insurance number

Permanent residential address

[Two empty text input boxes for permanent residential address]

Postcode

[Empty text input box for postcode]

Country

[Empty text input box for country]

Daytime telephone number

[Empty text input box for daytime telephone number]

Email address

[Empty text input box for email address]

(If phone number is non-UK, provide full dialling code)

I request that I am removed as the registered contact for the above child and replaced by the new registered contact, who has parental responsibility, with effect from the date of this application.

Existing registered contact's name

[Empty text input box for existing registered contact's name]

Date

[Empty text input box for date]

Existing registered contact's signature

[Empty text input box for existing registered contact's signature]

New registered contact details

Title

[Empty text input box for title with options: Dr / Mr / Mrs / Miss / Ms / Other]

Surname

[Empty text input box for surname]

Forename(s)

[Empty text input box for forename(s)]

Date of birth

[Empty text input box for date of birth]

National Insurance number

[Empty text input box for national insurance number]

Permanent residential address

[Two empty text input boxes for permanent residential address]

Postcode

[Empty text input box for postcode]

Country

[Empty text input box for country]

Daytime telephone number

[Empty text input box for daytime telephone number]

Email address

[Empty text input box for email address]

If you've been resident at this address for less than three years, please provide your previous address(es) on a separate sheet of paper and attach it to this application.

Do they have an existing AJ Bell Account?

Yes

No

If 'Yes', please provide the existing account number

[Empty text input box for existing account number]

Were you born in the UK? And are you solely a UK citizen, solely a UK national and solely resident in the UK for tax purposes? To tick Yes, all need to apply.

Yes (If 'Yes', please ignore section B)

No (If 'No', please complete section B)

Section B – Only complete if your country of birth, residency, nationality or citizenship is non-UK

Country of birth

Nationality

Please check the nationality table at the end of this form, and provide your relevant identification number. If there's more than one option for your nationality, please let us know which identification number you're providing us with in the box below.

Identification number

Type of number (if applicable)

If your nationality isn't listed in the table, please provide your national passport number.

Passport number

If you don't have your identification number or passport number, please contact us. For more information, please visit ajbell.co.uk/nci.

Country of residence for tax purposes

Second country of residence for tax purposes (if applicable)

Country of citizenship

Second country of citizenship (if applicable)

Please list all your nationalities and countries of citizenship and tax residency. If you're a national of more than one country, please provide your further nationalities and identification numbers on a separate sheet and attach it to this application. If you're a citizen or tax resident of more than two countries, please list all details on a separate sheet of paper and attach it to this application.

New registered contact declarations

I declare that I am 16 years of age or over and have parental responsibility for the child named above. I will be the current registered contact for the Junior ISA effective from the date of this application instead of the existing registered contact who is being replaced.

I have not subscribed and will not subscribe to another stocks and shares Junior ISA for this child. I am not aware that this child has another stocks and shares Junior ISA and I am not aware of other Junior ISA subscriptions that will result in this child exceeding the annual limit. I will not knowingly make subscriptions to Junior ISAs for this child that will result in the subscription limit being exceeded.

I authorise AJ Bell Securities Limited as Junior ISA manager and/or its nominee

- i. to hold the child's subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
- ii. to make on the child's behalf any claims to relief from tax in respect of Junior ISA investments.

The declaration and information contained in this application is correct to the best of my knowledge and belief and I undertake to notify AJ Bell of any changes without delay.

I confirm that I have been recommended to read and given the opportunity to read, ensure I understand and keep copies of the Junior ISA key features, charges and rates and terms and conditions. I agree to be bound by the Junior ISA terms and conditions as may be amended from time to time.

Data privacy statement

We'll use the information you provide to check your identity – and the identity of anyone else who funds an investment made in your name – with credit reference and fraud prevention agencies. These agencies will record our checks and will make that record available so others are able to verify your identity.

So we can thoroughly check the available data, we verify your identity using scoring methods. If you supply false or inaccurate information and we suspect fraud, we'll inform the fraud prevention agencies.

If we can't verify your identity by electronic means, we may ask you for additional information.

Depending how the data has been processed, and subject to some exemptions, you have a number of legal rights about your personal information. These include:

- To access personal information
- To rectify/erase personal information
- To restrict the processing of your personal information
- To transfer your personal information
- To object to the processing of personal information
- To object to how we use your personal information for direct marketing purposes
- To obtain a copy of personal information safeguards used for transfers outside your jurisdiction
- To lodge a complaint with your local supervisory authority

To exercise these rights (or request details of the credit reference and fraud prevention agencies from which we obtain information and record information about you), please contact us. For more information see our privacy policy.

How we communicate with you

Being a DIY investor is all about staying up to date. The good news is: we can help you.

AJ Bell would like to send you emails and other electronic communications to help you on your investing journey. Not only can you expect weekly market news and Shares magazine content, but you'll be the first to hear about exclusive customer offers – including regular prize draws and invites to our popular investing events.

If you receive anything you don't like, don't worry: you can manage the type of communications you receive and unsubscribe at any time by updating your communications preferences in the 'my account area' of our website.

We would like to receive communications including investment updates, weekly market news, exclusive customer offers and free content from Shares magazine.

Yes

No

New registered contact's name

Date

New registered contact's signature

Nationality

Belgium	Belgian National Number (Numéro de registre national – Rijksregisternummer)	Liechtenstein	National Passport Number or National Identity Card Number
Bulgaria	Bulgarian Personal Number	Lithuania	Personal code (Asmens kodas)
Croatia	Personal Identification Number (OIB – Osobni identifikacijski broj)	Malta	National Identification Number or National Passport Number
Cyprus	National Passport Number	Netherlands	National Passport Number or National identity card number
Czech Republic	National identification number (Rodné číslo) or Passport Number	Norway	11 digit personal ID (Foedselsnummer)
Denmark	Personal identity code 10 digits alphanumerical: DDMMYYXXXX	Poland	National Identification Number (PESEL) or Tax Number (Numer identyfikacji podatkowej)
Estonia	Estonian Personal Identification Code (Isikukood)	Portugal	Tax number (número de identificação fiscal) or National Passport Number
Finland	Personal identity code	Romania	National Identification Number (Cod Numeric Personal) or National Passport Number
Greece	10 DSS digit investor share	Slovenia	Personal number (Rodné číslo) or National Passport Number
Iceland	Personal Identity Code (Kennitala)	Slovakia	Personal number (Rodné číslo) or National Passport Number
Italy	Fiscal code (Codice fiscal)	Spain	Tax identification number (Código de identificación fiscal)
Latvia	Personal code (Personas kods)	Sweden	Personal identity number

If you do not have the identification number required please contact us. If you are a national of more than one country please provide nationality and your identification number on a separate sheet and attach it to this application. For more information please visit ajbell.co.uk/nci.