

# Family linking application form



This form lets family members with AJ Bell accounts appoint an Account Lead and link their account to them. Each linked family member can grant 'view only' or 'dealing' access to the Account Lead. There can only be one Account Lead per linked family group, and you can only link to one Account Lead at any given time.

Keep in mind the Account Lead can't be a financial adviser acting in a professional capacity on your behalf.

Please note, the two accounts you can't include in family linking are Junior ISAs and Cash savings hubs. Junior ISAs can only be managed by the registered contact who opened the account, who will already have full access. And Cash savings hubs can only be viewed and managed by the account holder.

Before we grant linked access, we'll verify the arrangements by sending an email to each linked customer listed on this form.

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

## Account Lead - your details

Full name

Permanent residential address

Postcode

Country

Account number

## Account Lead - declarations

I consent to act as Account Lead for the account(s) of the customers named in this form.

I agree to act in accordance with the relevant account terms and conditions.

I agree to indemnify AJ Bell Management Limited, Sippdeal Trustees Limited and AJ Bell Securities Limited (together 'AJB Companies') from and against all claims, demands, liabilities, costs, losses and expenses (including legal costs) suffered or incurred arising directly or indirectly as a result of any act or omission on my part in relation to the account(s) of the customer(s) listed below.

Your signature

Date

## Customers to be linked to the Account Lead

Please note that a maximum of **five** customers can be linked.

By signing below you:

- authorise AJ Bell Management Limited, Sippdeal Trustees Limited and AJ Bell Securities Limited (together 'AJB Companies') to disclose information about your account to the Account Lead
- acknowledge that the Account Lead will be granted either 'view only' or 'dealing' access to your accounts. Dealing access will enable the Account Lead to buy and sell investments, create and respond to secure messages and make elections for Corporate Action options
- acknowledge that your authority shall apply to all AJ Bell accounts that you hold, unless otherwise instructed by you
- acknowledge that you must notify AJ Bell in writing if you intend to cancel this authority and that the Account Lead's permissions shall remain in place for your account(s) until AJ Bell confirms by secure message that your instructions have been actioned
- agree to indemnify the AJB Companies from and against all claims, demands, liabilities, costs, losses and expenses (including legal costs) suffered or incurred arising directly or indirectly as a result of any act or omission on the part of the Account Lead in relation to your AJ Bell account(s)
- confirm that the Account lead is not acting as your financial adviser for your AJ Bell accounts

Please note the Account Lead will not be able to change your personal details, password or security question or instruct withdrawals to be made from your AJ Bell account(s).

Full name

Account number

Relationship to Account Lead

I wish to grant the Account Lead named above (please choose one option only):

'View only' access to my AJ Bell account(s)

'Dealing' access to my AJ Bell account(s)

Your signature

Date

I acknowledge in signing this form that I make the declaration set out above.

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Full name

Account number

Relationship to Account Lead

I wish to grant the Account Lead named above (please choose one option only):

'View only' access to my AJ Bell account(s)

'Dealing' access to my AJ Bell account(s)

Your signature

Date

I acknowledge in signing this form that I make the declaration set out above.

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Full name

Account number

Relationship to Account Lead

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Full name

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Full name

Account number

Relationship to Account Lead

I wish to grant the Account Lead named above (please choose one option only):

'View only' access to my AJ Bell account(s)

'Dealing' access to my AJ Bell account(s)

Your signature

Date

I acknowledge in signing this form that I make the declaration set out above.

## Next steps

When the form is signed and completed, please scan and email it to [administration@ajbell.co.uk](mailto:administration@ajbell.co.uk)

Or if you prefer, you can post the completed form to us at:

AJ Bell Customer Services Team  
4 Exchange Quay  
Salford Quays  
Manchester  
M5 3EE

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AJ Bell Management Limited (company number 03948391), AJ Bell Securities Limited (company number 02723420) and AJ Bell Asset Management Limited (company number 09742568) are authorised and regulated by the Financial Conduct Authority. All companies are registered in England and Wales at 4 Exchange Quay, Salford Quays, Manchester M5 3EE. See website for full details.

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