

Junior ISA (Stocks & Shares) Application Form



IMPORTANT - In order to continue with your Junior ISA application, your child must be aged 17 or under and any Child Trust Fund they may have (applicable to children born between 1 September 2002 and 2 January 2011 only) will need to be transferred to Metfriendly. If you are happy to proceed please complete this application form and the relevant transfer form(s) which can be found at metfriendly.org.uk/CTF. If you have any queries or would like us to post the transfer form(s) to you, please call us now on 01689 891454.

The Metfriendly Junior ISA may be appropriate for those:

- Aged 17 or under.
- Who were born between 1 September 2002 and 2 January 2011 and wish to transfer their Child Trust Fund into an ISA.
- Who plan to make monthly contributions (of at least £30 per month) into a Junior ISA.
- Who, if they do not make monthly contributions, wish to make a lump sum contribution of at least £1,500 into a Junior ISA.
- Willing to accept medium to low risk for potential higher returns (bonuses)

The Metfriendly Junior ISA may not be appropriate for those:

- Aged 18 or above.
- Age 17 or under who currently hold a stocks and shares Junior ISA elsewhere and does not want to transfer it to Metfriendly.
- Who were born between Sept 2002 and January 2011, currently hold a Child Trust Fund and wish to retain it.
- Who want a guaranteed return or capital protection.

Details of Parent/Legal Guardian (delete as applicable).

As a parent or legal guardian of the Child for whom this ISA is being opened you will be known as the Registered Contact to whom all correspondence will be addressed.

Mr/Mrs/Ms/Miss	Surname	Forename(s)	
First line of home address			Postcode
			Date of Birth <input type="text"/> <input type="text"/> <input type="text"/>
Email Address		Preferred Contact No	

- We would like to email you from time to time with relevant information on financial issues relating to the police, such as police pay, and products and services we provide including special offers. If you would like to receive the above information **please indicate your consent by ticking the box to the left**. You will be able to unsubscribe from these communications easily and at any time.

Details of Child

Child's Surname	Child's Forename(s)		
First line of home address (if different to above)			Postcode
		Date of Birth <input type="text"/> <input type="text"/> <input type="text"/>	Gender M <input type="checkbox"/> F <input type="checkbox"/>

Child's Eligibility: If the child is eligible for this plan through someone OTHER than the Parent/Legal Guardian please give details here.

Name	Relationship to Child
Constabulary	Warrant/Payroll No

Tick to confirm that you have enclosed a copy of the child's birth certificate and that you as parent/guardian have signed it on the reverse to confirm that it is a true copy (always required)

The following details should be given for the applicant or eligible relative of the child:

Your answers to the following questions will help ensure this product meets your savings needs. If you are in any doubt whether this Junior ISA meets you or the child's savings needs, then please call us on 01689 891454 or email info@metfriendly.org.uk.

1. Has the child used their full ISA allowance in the current tax year? Yes No
2. Does the child hold a Junior stocks and shares ISA elsewhere? Yes No
3. Are you aware that penalties apply in the early years and that the child may get back less than has paid in? Yes No
4. Are you aware that the parent / legal guardian will be the registered point of contact until the child reaches age 16? Yes No

5. What type of savings or investments do you currently hold or have held in the past? (please tick all that apply)

- None**
- Cash accounts**, for example current accounts, savings accounts, notice accounts, fixed term accounts, cash ISAs, national savings, premium bonds and guaranteed bonds.
- Fixed interest investments**, for example gilts, index-linked gilts and corporate bonds
- Pooled investments**, for example stocks and shares ISA, insurance ISA, With Profit Bond/savings, unit trusts and investment trusts.
- Direct Investments**, for example company stocks and shares
- Specialist investments**, for example property (not including the home that you live in), gold, commodities, options, futures, derivatives, art and wine.

6. What is your knowledge and experience with savings and investments? (please tick the most appropriate)

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
a. I am experienced with investing money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. I am knowledgeable about saving and investing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. I am knowledgeable about with-profits investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Have you ever held any with-profits investments? (please tick one)

- Yes, I have held with-profit policies No Don't Know

8. What qualifications do you have? (please tick all that apply)

- None**
- School exams**, for example GCSE, O Level, A Level, Leaving Certificate, Higher Certificate
- University Degree**, for example BSc, BA
- Post Graduate** (Masters or Doctorate)
- Vocational Qualification**, for example, NVQ, Certificate of Knowledge of Policing, Police Promotional and/or CID exams
- Professional Qualification**, for example, Accountancy, Law or Medicine

9. What is your most recent occupation? (please tick one)

- Police Officer Police Staff Other (please state)

Important

For your and the child's own benefit and protection, you should read the **Key Information Document** associated with this product, available by request or viewable at metfriendly.org.uk. A copy will also be posted to you once the plan is set up. If you do not understand any point please ask for further information.

By taking out this policy/plan the child automatically becomes a member of Metfriendly and is subject to our Rules, which are available on our website or on request from us.

The plan will not commence until a valid application has been received AND a contribution has been made or set up (unless there is a Child Trust Fund transfer in progress).

The child named in 'Details of Child' will be the beneficial owner of the Junior ISA Plan.

National Insurance No. (if child is 16 or 17)

Open Junior ISA with a lump sum deposit of £ (£1,500 minimum)

Open Junior ISA with a monthly contribution of £ (£30 minimum)

I wish to opt into the Metfriendly Escalator.*

Escalation amount (minimum £10) £20 £50 £75 £100 Other £

*The Metfriendly Escalator will automatically increase your monthly contributions, until you tell us to stop. The monthly contribution increase will take place every April, starting in the following calendar year.

Relationship to Child

Details of Payer (if different from parent/legal guardian).

If not a current member of Metfriendly, please tick to confirm that you have enclosed your proof of ID and home address, and that you have signed the reverse of the copies to confirm they are a true copy of the original.

Mr/Mrs/Ms/Miss	Surname	Forename(s)		
First line of home address				Postcode
Date of Birth			<input type="text"/>	Gender M <input type="checkbox"/> F <input type="checkbox"/>
Email Address		Preferred Contact No		

Payer Authority

I authorise the deduction from my salary (serving members only) or bank account of all premiums due. (If you wish to pay us by Direct Debit please call us or email info@metfriendly.org.uk.)

Signed

Date

Declaration & Authorisation

I declare that:

- I am 16 years of age or over
- I am the child/I have parental responsibility for the child (delete which does not apply)
- I/the child does not have a Child Trust Fund Account (or the Child Trust Fund is being transferred to Metfriendly and a transfer form has been completed)
- I will be the registered contact for the Junior ISA
- The child is resident in the UK
- I have not subscribed and will not subscribe to another stocks & shares Junior ISA for this child
- I am not aware of any other stocks and shares Junior ISA held by this child
- 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
- The personal details in this application are true

I authorise Metfriendly:

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

Declaration

- I hereby apply for the Metfriendly stocks and shares Junior ISA on behalf of the named child, and accept the terms and conditions as described within the product literature and elsewhere within this application.
- On behalf of the named child I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless they are already a Member) and I agree on behalf of the child to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appears on its website metfriendly.org.uk and are available in printed form upon request).

Signed

Date

Promotional Code

To be signed by Parent/Legal Guardian

***If you wish to pay premiums by Direct Debit please call or email us at info@metfriendly.org.uk.**

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between the applicant (on behalf of the child) and us. We will share the registered contact's data with our mailing house partners (see our privacy notice) to send legally required documents such as the annual benefit statement and invitation to our Annual General Meeting. The data will only be kept for such a time needed to perform these tasks. Where possible we use external information to verify your identity and to keep our records up to date on home address changes. We use a third party provider to deliver our marketing emails. We gather statistics around email opening and clicks using industry standard technologies. For more information, please see our privacy notice at www.metfriendly.org.uk/privacy

How did you hear about Metfriendly?

I am a member Newsletter I received a letter Brochure stand Intranet Received an email
Personal recommendation Internet search Twitter Facebook I spoke to a Metfriendly representative
I saw an advert - please state which publication Other - please state

Publication/Other

Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Fax: 01689 891455 Metphone: 846690 Email: info@metfriendly.org.uk

Metfriendly is a trading name of the Metropolitan Police Friendly Society Limited.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Incorporated under the Friendly Societies Act 1992 and registered in the UK No. 496F