

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 1st September 2002 and 2nd January 2011 only) will need to be transferred to us. If you are happy to proceed, please complete this application form and the relevant transfer form(s), which can be found at mpfs.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.

Before you apply for our Junior ISA, please be aware that:

- ☒ Our Junior ISA is appropriate for those aged 17 or under
- ☒ Is appropriate for individuals who were born between 1st September 2002 and 2nd 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) and/or wish to make a lump sum contribution of at least £1,500 into a Junior ISA
- ☒ Are willing to accept medium risk for potential higher returns (bonuses).

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/Other	Surname	Forename(s)	
First line of home address		Postcode	
Date of Birth		Mobile No	
Personal Email		Warrant/Payroll No (if applicable)	
National Insurance Number of Parent/Legal Guardian			

National Insurance Number If you have your National Insurance (NI) number please enter it in the boxes above. You can find your NI number online in your HMRC account or App, in any documents you already have, for example a payslip, P45 or P60, or at gov.uk/find-national-insurance-number

If Applicable

Police Join Date	
Constabulary (or connected constabulary of family member/friend etc.)	
Warrant Number/Customer/Membership No.	

What best describes you - e.g. serving Officer/Staff/retired/relative/former/current family member/friend, etc.

We would like to contact 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. You will be able to unsubscribe from these communications easily and at any time.

Please provide me with the above information by ☐ SMS ☐ Email ☐ Post ☐ Phone ☐ None

Do you have knowledge or experience of With-Profits or pooled investments such as Stocks & Shares ISAs or With Profit Bonds?

- ☐ Yes and I have read and understood the **Junior ISA Product Guide** and **Key Information Document***
- ☐ No

*A copy of these will be available during meetings with our representatives or on the product page of the website when selecting this product online. In addition, a copy will also be sent to you once the Junior ISA is set up. If you do not understand any of the points, please ask for further information.

Details of Child

Child's Surname

Child's Forename(s)

First line of home address (if different to above)

Postcode

Date of Birth

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

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@mpfs.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 & 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 been 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 ☐

Important

For your own and the child's benefit and protection, you should read the **Key Information Document** and **product particulars** relating to this plan.

By taking out this policy/plan, the child automatically becomes a Member 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)

For the 2025/2026 tax year

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

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

Our Escalator

Save more in the long run with an annual escalator...by automatically increasing your monthly payments by £20 each April over 10 years, you would save an extra £13,200. The increase will take place each April starting the following calendar year and subsequent years. You can adjust the monthly payment and escalator amount at any time.

Escalation amount £10 ☐ £20 ☐ £50 ☐ £75 ☐ £100 ☐ Other ☐ £

Please note the maximum allowance for the Junior ISA is £9,000 for each tax year.

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

Mr/Mrs/Ms/Miss/Other

Surname

Forename(s)

First line of home address

Postcode

Date of Birth

Personal Email

Mobile No

Payer Authority

I authorise the deduction from my salary (where available) or direct debit.

Signed

Date

Confirming Your Identity

To process your application, we will refer to Credit Reference Agencies to confirm your identity. This search will leave a 'footprint' on your credit file, which is required to record that the check has taken place. This footprint is not the same as a credit check footprint and has no negative impact on your file. Please read the following:

ID Declaration

I understand that you will undertake a search with a Credit Reference Agency for the purposes of verifying my identity. To do so the Credit Reference Agency may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained. Your information may be disclosed to a credit reference agency, which may keep a record of that information; and the credit reference agency may disclose that information, and the fact that a search was made, to its other customers for the purposes of assessing the risk of giving credit and occasionally to prevent fraud, money laundering and to trace debtors.

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 us 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 & 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 MPFS:

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 declare that the information given is correct to the best of my knowledge and belief and apply for a Junior Stocks & Shares ISA on behalf of the named child, and accept the terms and conditions as described within the product literature and elsewhere within this application. I confirm I have also read the Key Information Document.
- On behalf of the named child, I apply for membership of 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 the Rules at all times (a copy of our Rules appear on the website mpfs.org.uk and are available in printed form upon request).

Signed	Date	Promotional Code	IF APPLICABLE
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To be signed by Parent/Legal Guardian

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform this task. 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 open rates and clicks using industry-standard technologies. For more information, please see our privacy notice at mpfs.org.uk/privacy

Contact Details

MPFS, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Email: info@mpfs.org.uk

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