

THE  
**FAMILY**  
BUILDING  
SOCIETY



**CASH JUNIOR ISA**  
APPLICATION FORM

# JUNIOR INDIVIDUAL SAVINGS ACCOUNT (ISA) APPLICATION

ACCOUNT DETAILS - PLEASE FULLY COMPLETE USING BLOCK CAPITALS. FIELDS MARKED WITH A \* ARE OPTIONAL.

## REGISTERED CONTACT

(Details of the legal guardian applying on behalf of the account holder – see page 5 of the Cash Junior ISA leaflet for definitions)

## I APPLY TO OPEN A CASH JUNIOR ISA FOR

(Details of the account holder/child)

TITLE:	MR / MRS / MISS / MS	
SURNAME:		
FORENAMES:		
PERMANENT HOME ADDRESS:		
POSTCODE:		
LENGTH OF TIME AT ADDRESS:	Years	Months
HOME TELEPHONE:*		
MOBILE TELEPHONE:*		
EMAIL ADDRESS:*		
DATE OF BIRTH:		
COUNTRY AND TOWN OF BIRTH:		
MARITAL STATUS:		
OCCUPATION:		

TITLE:	MR / MRS / MISS / MS	
SURNAME:		
FORENAMES:		
PERMANENT HOME ADDRESS:		
POSTCODE:		
LENGTH OF TIME AT ADDRESS:	Years	Months
HOME TELEPHONE:		
MOBILE TELEPHONE:		
EMAIL ADDRESS:		
DATE OF BIRTH:		
COUNTRY AND TOWN OF BIRTH:		

NATIONAL INSURANCE No:

NATIONAL INSURANCE No:   
(if applicable)

(If you do not know your National Insurance number, please refer to your P60, Notice of Coding, or Tax Return. Otherwise your employer or Tax Office may be able to help)

\* If we have a home or mobile telephone number or email address for you, we may use these to get in touch regarding your application or with important information about your account. This could include letting you know about any concerns we have about the activity on your account.

TAX IDENTIFICATION No:

(Only applicable to foreign nationals working in the UK)

IF YOU ARE AN EXISTING CUSTOMER PLEASE STATE YOUR ACCOUNT No:

RELATIONSHIP TO ACCOUNT HOLDER:

IF THE ACCOUNT HOLDER / CHILD IS AN EXISTING CUSTOMER PLEASE STATE THEIR ACCOUNT No:

**The child named above will be the beneficial owner of the investments held in the Junior ISA.**

HOW DID YOU FIND OUT ABOUT THIS ACCOUNT?



## DECLARATIONS

### 1 GENERAL

I hereby declare that:

- 1.1 The sum being invested does not belong to a company or other corporate body and will not be held by me as trustee(s) for a company or corporate body.
- 1.2 I have received the following:
  - Product Features leaflet.
  - General Conditions for our Savings Accounts booklet.
  - The Financial Services Compensation Scheme (FSCS) Information Sheet.
  - The leaflet on “How We Use Personal Information”.
- 1.3 I agree to notify the Society of any changes to my personal details as set out overleaf.
- 1.4 The information supplied on this form is true and correct to the best of my knowledge and belief.
- 1.5.1 I am 16 years of age or over.
- 1.5.2 I am the child / I have parental responsibility for that child (delete which does not apply).
- 1.5.3 I / The child does not have a Child Trust Fund account.
- 1.5.4 I will be the registered contact for the Junior ISA.
- 1.5.5 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.
- 1.5.6 I have not subscribed and will not subscribe to another Junior ISA of this type for this child.
- 1.5.7 I am not aware that this child has another Junior ISA of this type.
- 1.5.8 I am not aware of other Junior ISA subscriptions that will result in this child exceeding the annual limit.
- 1.5.9 I will not knowingly make subscriptions to Junior ISAs for this child that will result in the subscription limit being exceeded.
- 1.6 I acknowledge that I have 15 calendar days from the opening of this account to notify the Society that I am not happy with my choice of account and, subject to cheque clearance, without notice or penalty, withdraw from the investment, with any interest earned, or, subject to eligibility, transfer the investment to another account of my choice.
- 1.7 I accept that as a holder of a share account, the child will be a member of the Society and bound by the Rules.
- 1.8 I accept that I will be bound by:
  - the terms set out in the General Conditions for Savings Accounts, and
  - the specific conditions of the Junior ISA applicable from time to time.
- 1.9 I authorise the Family Building Society:
  - 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.
- 1.10 I declare that the money I invest does not belong to a company or other corporate body and will not be held by me as trustee for a company or corporate body.

**I agree to the Junior ISA terms and conditions and confirm that to the best of my knowledge and belief the information in this form is true.**

### 2 AGREEMENT TO ASSIGN CONVERSION BENEFITS TO CHARITY

- 2.1 By applying to open a share account on or after 14 February 2000 I agree with the Society and the Charities Aid Foundation (“the CAF”) that I will assign to the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 11 February 2000 between the Society and the CAF, in which case references to the CAF shall include references to any other charity(ies) but to no other person), the rights to any relevant conversion benefits (defined in paragraph 2.1.1 below). This agreement to assign will not apply to me if I fall within any class of persons which, as at today’s date, the Society wishes to be excluded from such

obligation. This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me. I understand that neither the Society nor the CAF will release me from this agreement or vary its terms and (except as set out in paragraph 2.2 below) I will continue to be bound by the agreement even if the Society decides at some time in the future that it is no longer in the best interests of the Society to continue with the above assignment condition generally in respect of new members.

- 2.1.1 “Relevant conversion benefits” means any benefits to which I might become entitled as a shareholding member of the Society under the terms of any future transfer of the Society’s business to a company (i.e. on a conversion or take-over) which is completed at any time within the five years immediately following the date on which my share account is opened or, if applicable, the shorter period set out in the list referred to below. “Relevant conversion benefits” does not include the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company on a conversion or take-over.
- 2.1.2 If the Society merges with any other society, after the date of such merger the “Society” includes such other society.
- 2.2 I authorise the Society to pass to the CAF such information relating to me and my accounts with the Society as the CAF may reasonably require in order to administer this agreement and the relevant conversion benefits and for no other purpose. I consent to both the Society and the CAF holding and processing such information for such purposes. A list of the classes of persons which the Society currently wishes to be excluded from the agreement to assign, or in respect of which a shorter period applies, (which list may change from time to time but not with retrospective effect) is available on request from the Society’s branch or principal office.

### INFORMATION ABOUT ELECTRONIC PAYMENTS TO AND FROM YOUR ACCOUNT

Each month we will send you a statement listing the electronic payments on your account, unless there are no payments in that month. This excludes crediting or payment of interest. Alternatively, we can give you this information on request or via our Online Service. If you do not wish to receive such monthly statements, please tick the box

### MARKETING

We would like to tell you about our products, services, and events and those of our carefully selected partners (a list of which is available on request). We will always treat your personal details with the utmost care and will never share them with other companies for marketing purposes. If you give consent this will last as long as you have a relationship with us. If you agree to us communicating with you for marketing purposes, please tick the relevant boxes below to confirm how we may contact you.

Applicant One: Post  Email  Phone  Text

You can unsubscribe from marketing at any time by writing to: Family Building Society, Ebbisham House, 30 Church Street, Epsom, Surrey KT17 4NL.

### CONSENT AND CONFIRMATION

For your own benefit and protection you should carefully read the Product Features leaflet, Product Summary Box and the General Conditions for our Savings Accounts Booklet as these contain the terms and conditions upon which we intend to rely. You should do this before signing this application form. If you have any questions about the account terms and conditions please contact our New Business Team on 03330 140141 or newbusiness@familybsoc.co.uk

**By signing this application form you are:**

- confirming that you have read the section “Using Your Personal Information” above, and the leaflet “How We Use Personal Information” which accompanies this application form.
- making the declarations and giving the authorities set out in the section “DECLARATIONS” above.
- agreeing to the use of your personal information to enable us to provide you with payment services, such as faster payments, to and from your account.

REGISTERED CONTACT*	SIGNED:	DATE:	DD	MM	YYYY
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\*Or the child, if aged 16 or 17.

### PLEASE RETURN THIS APPLICATION FORM AND NECESSARY IDENTITY DOCUMENTS TO:

FAMILY BUILDING SOCIETY, FREEPOST, 30 CHURCH STREET, EPSOM, SURREY KT17 4BR. ALTERNATIVELY YOU CAN UPLOAD YOUR APPLICATION FORM SECURELY TO FAMILYBUILDINGSOCIETY.CO.UK/UPLOAD

PLEASE RETAIN THE PRODUCT FEATURES LEAFLET, GENERAL CONDITIONS FOR OUR SAVINGS ACCOUNTS BOOKLET AND THE FSCS INFORMATION SHEET FOR YOUR FUTURE REFERENCE.

FAMILY BUILDING SOCIETY IS A TRADING NAME OF NATIONAL COUNTIES BUILDING SOCIETY.