

Junior ISA Re-registration

Application to re-register Junior ISA

How to fill in this form:

- You can only re-register a Junior ISA if you have parental responsibility for the child who will be the account holder.
- You must complete sections 1, 2, 3 and Letter of Authority.
- Please use black ink and write clearly inside the boxes using capital letters.
- If you make a mistake, you can correct it, but please don't use correction fluid. If you have any questions about the form, please speak to our customer services team.

What's next?

Please send your completed form to:

Fidelity
PO Box 391
Tadworth KT20 9FU

1 About the child who will be the account holder

Customer Reference Number (Only if the child already has a Fidelity account)

1	0									
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Title

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Surname

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First and other names in full

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Date of birth (DDMMYYYY)

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Nationality

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Is the child a UK National only? (Please mark an X in the box)

Is the child a UK National and National of one or more other countries?
 (Please mark an X in the box and list all other countries below)

Is the child a National of Non-UK countries only?
 (Please mark an X in the box and list all other countries below)

Nationality 1

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Nationality 2

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Nationality 3

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Nationality 4

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National Insurance Number

If the child does not have a National Insurance Number, please mark an X in the box.

Address – ‘Care of’ and PO Box are not acceptable. Only UK addresses are eligible unless you or your spouse /civil partner are a Crown Employee or British Forces Posted Overseas.

House number/name

Street, city, county and country

 Postcode

2 About you - the account holder's registered contact (parent)

To help prevent fraud and money laundering we need to check your identity. We may be able to do this online using the information you give us below. The check will create a record on your credit report, which will only be visible to you and will not affect your credit score.

Title

 Mr Mrs Ms Other:

Surname

First and other names in full

Date of birth (DDMMYYYY)

National Insurance Number

If you do not have a National Insurance Number, please mark an X in the box.

Do you have an account with Fidelity?

 No Yes - please give us your client reference number

Are you a UK National only? (Please mark an X in the box)

Are you a UK National and National of one or more other countries?
(Please mark an X in the box and list all other countries below)

Are you a National of Non-UK countries only?
(Please mark an X in the box and list all other countries below)

Nationality 1

Nationality 2

Nationality 3

Nationality 4

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P/JISACA-Rereg

Your address (if different to the child) – ‘Care of’ and PO Box are not acceptable. Only UK addresses are eligible unless you or your spouse /civil partner are a Crown Employee or British Forces Posted Overseas.

House number/name

Street, city, county and country

 Postcode

Phone number

Mobile number

Email

3 Declaration and signature

I apply to re-register a Junior ISA for the child named in section 1 of this application.

- I have parental responsibility for the child named in this application and I am the registered contact for the Junior ISA being transferred.
- I am 18 years of age or over.
- The child named in this application is resident in the UK and not a US person.
- I have read and saved or printed the latest version of:
 - the Key Features Document - Doing Business with Fidelity incorporating the Fidelity Client Terms
- I accept the Fidelity Client Terms.
- I understand that I cannot hold a Stocks and Shares Junior ISA for the child with more than one provider at any given time and will wait for the transfer to be completed before adding new monies to the Junior ISA with Fidelity.
- I also understand it takes some time to re-register over the current year remaining allowances over to Fidelity and its my responsibility to make sure I don't exceed the current tax year subscription amounts into the Junior ISA.
- I authorise Financial Administration Services Limited 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

- Make on the child's behalf any claims to tax relief in respect of Junior ISA investments.
- I understand that the information I provide in this application will be processed in accordance with the data protection statement in the Personal Investing Client Terms.
- The information I have provided in this application is correct, to the best of my knowledge, and I will inform Fidelity immediately of any changes.

Signature

Print name

Date

 (DDMMYYYY)

4 Declaration and signature

By completing this form and signing below I hereby authorise the Junior ISA manager named to:

- Re-register or transfer all previous and current tax year Junior ISA holdings.
- Transfer any holdings that are not eligible for re-registration as cash to Fidelity
- Provide Fidelity with any information which we may require in respect to the Junior ISA managed by them on my behalf, including, but not limited to transaction and dividend histories and details of the current portfolio and its value.
- Cease collections of any regular savings plan with immediate effect.
- Transfer any residual payments into Junior ISA as cash.

Note: if we do not offer the same share class as the one held under the Junior ISA, we will convert the investments into another share class of the same fund. If any Junior ISA fund which you apply to re-register is not offered via Fidelity or is otherwise not eligible for re-registration, the shares or units will be sold and the cash proceeds will be transferred to us and held as cash pending your further instruction to invest in one or more alternative investments available through Fidelity.

Signature



Print name

Date

 (DDMMYYYY)

If you have any queries about this form please call our customer services team on **0800 41 41 61**.

Please send your completed JISA Re-registration form together with your completed Letter(s) of Authority to Fidelity International (Transfers), Fidelity International (Transfers), PO Box 391, Tadworth, KT20 9FU.

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