

Monthly subscription form

This is an application form for someone other than the registered contact to pay a monthly subscription to a Junior ISA. You'll also need to use this form if you're the registered contact but don't have an adult account with us.

(If you're the registered contact and do have an adult account with us, you can set up a monthly subscription by logging in to your account and selecting 'Regular payments'.)

The first two pages of the form should be filled in by the Junior ISA's registered contact. The Direct Debit mandate on the final page needs to be completed by the person making the payment.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

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

Once completed and signed, please return the form to us at the address below.

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Important notes

1. All subscriptions must be made from a UK bank or building society account in the payee's name.
2. Subscriptions will be taken from the payee's bank account on the first working day of the month.
3. Junior ISA subscriptions are classed as a gift to the child. That means the money can't be returned if the contributor later changes their mind.

Child's details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Date of birth

National Insurance number

Account number

Permanent residential address

Postcode

Country

Telephone number

Email address

The person making the payments

Below, please complete the details of the person making the payments.

We may use this information to check their identity with credit reference and fraud prevention agencies. These agencies will record our checks and make the record available for others to conduct checks of their own. We may also verify the bank account details included on the Direct Debit instruction on the final page.

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Date of birth

Permanent residential address

Postcode

Country

Relationship to child

Do they have an existing AJ Bell Account?

Yes

No

If 'Yes', please provide the existing account number

Regular payment amount

Monthly subscription

£

Junior ISA Declaration

The information contained in this form is correct to the best of my knowledge and belief and I undertake to notify AJ Bell of any changes without delay.

Please sign and date this form.

Your name

Date

Your signature

The person making the payment must complete and sign the Direct Debit Instruction on the final page.

Junior ISA Direct Debit instruction

Please fill in the whole form using a ball point pen and send it to:

AJ Bell 4 Exchange Quay Salford Quays Manchester M5 3EE

Instruction to your Bank or Building Society to pay by Direct Debit

Service user number

3	8	8	5	8	8
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Name(s) of account holders

Bank/Building Society account number

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Branch sort code

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Name and full postal address of your Bank or Building Society

To the Manager	Bank/Building Society
Address	
Postcode	

For AJ Bell Securities Limited OFFICIAL USE ONLY
This is not part of the instruction to your Bank or Building Society.

Instruction to your Bank or Building Society

Please pay AJ Bell Securities Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by The Direct Debit Guarantee. I understand that this instruction may remain with AJ Bell Securities Limited and, if so, details will be passed electronically to my Bank/ Building Society.

Reference (your AJ Bell account number)

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Signature(s)
Date

Banks and building societies may not accept Direct Debit instructions for some types of account

This Guarantee should be detached and retained by the Payer

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit AJ Bell Securities Limited will notify you five working days in advance of your account being debited or as otherwise agreed. If you request AJ Bell Securities Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by AJ Bell Securities Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
 - If you receive a refund you are not entitled to, you must pay it back when AJ Bell Securities Limited asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.