

Your Junior ISA Application Form 2020/2021



Please ensure you have read the current version of the following documents before you make any investment decisions: Key Investor Information, Terms and Conditions and A Guide to Investing In a Junior ISA With Us. You can find all the latest documents by visiting [legalandgeneral.com/investments](https://www.legalandgeneral.com/investments). If you don't understand any point or would like us to send the documents to you, please call **0370 050 0955** and we'll be happy to help. We may record and monitor calls. Call charges will vary. The Terms and Conditions form the basis of our agreement with you.

1. About the Child

Forename(s)
(in full, not just initials)

Surname

Male

Female

Address
(permanent, UK
residential address –
we cannot accept c/o
details)

Postcode

Date of birth
(DD/MM/YYYY)
UK National Insurance
number (16 or over)

The child named above will be the beneficial owner of the account.

2. About the Registered Contact

The registered contact will be the person we communicate with in relation to this investment. They will be the only person who can make decisions regarding the management of this investment. The registered contact **can be the child if they're aged 16 or over** or someone with the rights and duties of a parent for the child.

The child named above is
the registered contact

Contact tel. number
(daytime)

Contact tel. number
(evening)

Email address

If the registered contact **is not** the child named in section 1, please complete your details below.

Title

Mr

Mrs

Ms

Miss

Other

Forename(s)
(in full, not just initials)

Surname

Male

Female

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Receipt number Client number Deal reference Agent number/stamp

02444461 U111AT01



2. About the Registered Contact continued

If the registered contact's address is different to the child's address stated in section 1, please ensure you complete the following.

Address
(permanent, UK
residential address –
we cannot accept c/o
details)

Are you a UK tax
resident?

If you are resident
outside the UK for tax
purposes

If you have ticked that
you do not have a tax
identification number,
please provide the
reason here

Please tick here if you
are not resident in any
country for tax purposes

Please provide your town
and country of birth

		Postcode	
Yes	No		
Please state in which country or countries you are resident for tax purposes		Please write your tax identification number	Please tick here if you do not have a tax identification number
Town		Country	

3. More about the Registered Contact

Are you a:

Legal & General
employee?

Legal & General shareholder?

Relative or friend of a
Legal & General employee/
shareholder?

(If you ticked the relative or friend box, please write their name below)

Name of employee/
shareholder

4. Where to Invest

You can obtain the current version of our Key Investor Information documents for our funds at legalandgeneral.com/investments or you can contact us on 0370 050 0955 if you would like us to send them to you. You MUST read the documents before submitting your investment.

Our minimum investment level is £20 for a monthly investment and £100 for a lump sum. The current annual allowance is £9,000.

	Monthly Investment	Lump Sum
Total	£	£
Multi-index 3 Fund	£	£
Multi-index 4 Fund	£	£
Multi-index 5 Fund	£	£
Multi-index 6 Fund	£	£
Multi-index 7 Fund	£	£

4. Where to Invest continued

Pick your own

Monthly Investment	Lump Sum
£	£
£	£
£	£
£	£
£	£
£	£
£	£
£	£
£	£
£	£

5. Paying for your Monthly Investment

The initial investment must be funded by the Registered Contact (the person named in part 2) or the Young Adult, if they're 16 or over and do not have a Registered Contact.

Preferred collection date for your direct debit (between 1st and 28th)

If you do not specify a collection date, we will automatically default your Direct Debit date to the 1st of every month.

Legal & General

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

Please fill in the whole form and send to:

Legal & General Investment Management, PO Box 6080, Wolverhampton WV1 9RB

Reference

Name and full postal address of your Bank or Building Society

To: The Manager

Bank or building society

Address

Postcode

Branch sort code

Name(s) of account holder(s)

Bank/building society account number



Service user number

6 7 0 7 5 3

Instruction to your Bank or Building Society

Please pay Legal & General 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 Legal & General and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date (DD/MM/YYYY)

• Banks and building societies may not accept Direct Debit Instructions for some types of account.

Please see A Guide to Investing in a Junior ISA with Us for your Direct Debit Guarantee.

6. Paying for your Lump Sum Investment

The initial investment must be funded by the Registered Contact (the person named in part 2) or the Young Adult, if they're 16 or over and do not have a Registered Contact.

Lump sum payments can be paid by cheque, please attach your cheque to this application. Cheques are payable to Legal & General.

7. Declaration and Authority

I declare that:

- I am 16 years of age or over
- I am the child/I have parental responsibility for the child
- I/the child does not have a Child Trust Fund account
- I will be the registered contact for this stocks and shares Junior ISA
- 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 registered civil partnership with a UK Crown servant
- I am not aware that this child is a US person
- I have not subscribed, and will not subscribe, to another stocks and shares Junior ISA for this child
- I am not aware that this child has another stocks and shares Junior ISA
- 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, when added up with other subscriptions, result in the overall subscription limit being exceeded for the tax year in which this application is made and in any subsequent tax year.

I authorise Legal & General:

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

Important please read: Data protection

Data Protection

Legal & General takes your privacy very seriously. Under data protection legislation, we have classified Legal & General (Unit Trust Managers) Limited (the "Manager") as a 'data controller' (and in the case of an investment in the OEIC, the Manager and the OEIC as "joint data controllers").

This means that we are subject to certain obligations relating to how we process personal data. These obligations include, without limitation, providing individuals with certain information regarding how we process their personal data.

We will use the personal data you have provided in this application form, including your name, age, contact details, bank account details, transactions and the invested amount in accordance with all applicable data protection laws and our Privacy Policy which is available at [lgim.com/UTMprivacy](https://www.lgim.com/UTMprivacy) (or otherwise available upon request).

Our Privacy Policy sets out, amongst other things, the purpose or purposes for which your personal data is collected and intended to be processed and also contains any other information prescribed by data protection legislation.

Communication

In order to process your personal data for the purposes of marketing (which may be carried out by the Manager or entities within the Legal & General group of companies), the Manager, acting as a data controller seeks your consent.

Please tick if you wish to receive marketing communications about the products and services of the Manager and the Legal & General group of companies (including news and exclusive offers) by email.

You may, at any time, object to the use of your personal data and withdraw your consent for the purposes of direct marketing at any time and free of charge by writing to the Data Protection Officer by letter and/or email at the address(es) provided in the Privacy Policy.

Access

You have the right to ask for a copy of your information.

To obtain a copy of your information, please write to us at the above address.

I confirm that:

The information given in this application is true and correct to the best of my knowledge and belief and I will inform

Legal & General without delay of any change in my circumstances affecting any of the information in this form.

I understand that a copy of the completed application form is available on request.

I have read the declaration carefully.

I accept that the Terms and Conditions form the basis of my agreement with Legal & General.

8. Confirmation and Registered Contact Signature

Please tick this box to confirm you've received the current Key Investor Information document(s) for the Junior ISA(s) you wish to invest in. If you've not received the document(s), please see the front cover for information on how to obtain a copy. We cannot accept your application if you have not ticked this box.

Signature

Date (DD/MM/YYYY)



**Please send your completed application to:
Legal & General Investment Management, PO Box 6080, Wolverhampton WV1 9RB.**



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