

Receipt number

Client number

Deal reference

02444461 U111AT01

# YOUR JUNIOR ISA TOP UP APPLICATION FORM 2019/2020



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Please ensure you have read the current version of the following documents before you make any investment decisions: Key Investor Information, Terms and Conditions. You can find all the latest documents by visiting [legalandgeneral.com/investments](http://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.

## HOW TO COMPLETE THIS FORM

- Please complete all sections using black ink and BLOCK CAPITALS.
- If you make a mistake, simply cross through and initial the change (do not use correction fluid).

## WHERE TO SIGN

- Once completed, sign and date the declaration in part 6.

## WHAT NEXT

- Enclose your personal cheque, if required, and please make it payable to 'Legal & General'.
- Return the completed form to **Legal & General Investment Management, PO Box 6080, Wolverhampton WV1 9RB.**

1

## CUSTOMER INFORMATION

Existing Junior ISA number

Child's full name

Are you the registered contact for this Junior ISA?

Yes  No 

2

## THIRD PARTY DETAILS (IF APPLICABLE)

If you are not the registered contact for this Junior ISA, please provide your address and telephone number below. This information will only be used if we need to contact you regarding this Junior ISA account. By signing this form, you are authorising Legal & General to release information contained on this top-up to the registered contact of the Junior ISA account.

Title

Mr  Mrs  Ms  Miss  Other 

Forename(s)

(in full, not just initials)

Surname

Male

Female

Address




Postcode

Contact telephone number

Would you like confirmation of the transaction to be sent to you?

Yes  No 

continues

**2** **THIRD PARTY DETAILS (IF APPLICABLE)** continued

Are you a UK tax resident?

Yes  No

If you are resident outside the UK for tax purposes

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

		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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 country and town of birth

Country

Town

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**3** **LUMP SUM AND DIRECT DEBIT TOP UPS**

**Important:** we'll invest top up contributions in the existing fund(s) held in the Junior ISA, unless the Registered Contact tells us otherwise. The Registered Contact must complete section 4 to select a different fund(s) in which to invest the top up.

**Please complete the following details where applicable:**

I would like to Top Up the Junior ISA with a lump sum of:

£

Please note the minimum lump sum Top Up is £100.

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

I would like to increase my existing monthly direct debit contributions to:

£

Also complete section 5 to confirm bank account details. The minimum monthly payment is £20.

I would like to set up new monthly direct debit contributions for:

£

**The current annual allowance is £4,368. Any top ups or direct debit payments that would breach this limit will be returned.**

The Registered Contact must complete this section to select a different fund(s) in which to invest the top up. **Only the Registered Contact** can make changes to the choice of fund(s) held in the Junior ISA. Information about the funds available for the Junior ISA is available at [legalandgeneral.com/investments](http://legalandgeneral.com/investments)

You can obtain the current version of our Key Investor Information documents for our funds at [legalandgeneral.com/investments](http://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.

SELECT YOUR OWN FUND(S)	MONTHLY INVESTMENT	LUMP SUM
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

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**

(To be signed by the registered contact)

X

**DATE**

**Please note:** Third-party gifter cannot select the fund into which their money will be invested. Your payment will be invested into the Junior ISA account according to the current fund profile.

**PAYING FOR MONTHLY DIRECT DEBIT**

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

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**

Service user number

670753



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/building society

Address

Postcode

Branch sort code

Bank/building society account number

Name(s) of account holder(s)

**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.

**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](http://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 address on the front of this form.

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

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

**I understand that once this transaction is processed the child will be the beneficial owner of the account investments.**

**I have read the declaration carefully.**

<b>SIGNATURE</b>		<b>DATE</b>	
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**PLEASE SEND YOUR COMPLETED APPLICATION TO:  
LEGAL & GENERAL INVESTMENT MANAGEMENT, PO BOX 6080, WOLVERHAMPTON WV1 9RB**

**Legal & General (Unit Trust Managers) Limited**  
Registered in England and Wales No. 01009418

**Registered office:** One Coleman Street, London EC2R 5AA

We are authorised and regulated by the Financial Conduct Authority.

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