

Junior ISA (Stocks & Shares) Application Form



metfriendly

The UK Police Family Finance Specialists

IMPORTANT - In order to continue with your Junior ISA application, your child must be aged 17 or under and any Child Trust Fund they may have (applicable to children born between 1 September 2002 and 2 January 2011 only) will need to be transferred to Metfriendly. If you are happy to proceed, please complete this application form and the relevant transfer form(s), which can be found at metfriendly.org.uk/CTF. If you have any queries or would like us to post the transfer form(s) to you, please call us now on 01689 891454.

The Metfriendly Junior ISA may be appropriate for those:

- Aged 17 or under
- Who were born between 1 September 2002 and 2 January 2011 and wish to transfer their Child Trust Fund into an ISA
- Who plan to make monthly contributions (of at least £30 per month) and/or wish to make a lump sum contribution of at least £1,500 into a Junior ISA
- Willing to accept medium risk for potential higher returns (bonuses).

The Metfriendly Junior ISA may not be appropriate for those:

- Aged 18 or above
- Age 17 or under who currently hold a stocks and shares Junior ISA elsewhere and does not want to transfer it to Metfriendly
- Who were born between Sept 2002 and January 2011, currently hold a Child Trust Fund and wish to retain it
- Who want a guaranteed return or capital protection.

Details of Parent/Legal Guardian (delete as applicable).

As a parent or legal guardian of the child for whom this ISA is being opened, you will be known as the Registered Contact to whom all correspondence will be addressed.

Mr/Mrs/Ms/Miss	Surname	Forename(s)
First line of home address		Postcode
Date of Birth	<input type="text"/> <input type="text"/> <input type="text"/>	Preferred Contact No
Email Address	Warrant/Payroll No (if applicable)	
National Insurance Number of Parent/Legal Guardian <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		

Here at Metfriendly we take your privacy seriously. We will use your email address to confirm your application. In addition, we will from time to time provide you with relevant information on financial issues relating to the Police and the products and services we provide including special offers, by post. We will not contact you by phone for marketing purposes. If you prefer not to receive this information by post, you can email us at any time to unsubscribe (enquiries@mpfs.org.uk).

If you would prefer to receive relevant information on financial issues and our products and services relating to the Police, by email or text message, please indicate your consent by ticking the box. You can email us at any time to unsubscribe (enquiries@mpfs.org.uk).

Details of Child

Child's Surname	Child's Forename(s)
First line of home address (if different to above)	
Postcode	Date of Birth <input type="text"/> <input type="text"/> <input type="text"/>
Child's Eligibility: If the child is eligible for this plan through someone OTHER than the Parent/Legal Guardian please give details here.	
Name	
Constabulary	Relationship to Child

The following details should be given for the applicant or eligible relative of the child:

Your answers to the following questions will help ensure this product meets your savings needs. If you are in any doubt whether this Junior ISA meets you or the child's savings needs, then please call us on 01689 891454 or email info@metfriendly.org.uk.

1. Has the child used their full ISA allowance in the current tax year? Yes No

2. Does the child hold a junior stocks & shares ISA elsewhere? Yes No

3. Are you aware that penalties apply in the early years and that the child may get back less than has been paid in? Yes No

4. Are you aware that the parent / legal guardian will be the registered point of contact until the child reaches age 16? Yes No

5. What type of savings or investments do you currently hold or have you held in the past? (please tick all that apply)

None

Cash accounts, for example current accounts, savings accounts, notice accounts, fixed-term accounts, cash ISAs, national savings, premium bonds and guaranteed bonds.

Fixed interest investments, for example gilts, index-linked gilts and corporate bonds.

Pooled investments, for example stocks and shares ISA, insurance ISA, With-Profit Bond/savings, unit trusts and investment trusts.

Direct Investments, for example company stocks and shares.

Specialist investments, for example property (not including the home that you live in), gold, commodities, options, futures, derivatives, art and wine.

6. What is your knowledge and experience with savings and investments? (please tick the most appropriate)

Strongly Agree Agree Disagree Strongly Disagree Don't Know

a. I am experienced with investing money

b. I am knowledgeable about saving and investing

c. I am knowledgeable about with-profits investments

7. Have you ever held any with-profits investments? (please tick one)

Yes, I have held with-profits policies No Don't Know

Important

For your own and the child's benefit and protection, you should read the **Key Information Document** and **product particulars** relating to this plan. A copy of these will be available during meetings with Metfriendly representatives or on the product page of the website when selecting this product online. In addition, a copy will also be posted to you once the Junior ISA is set up. If you do not understand any of the points, please ask for further information.

By taking out this policy/plan, the child automatically becomes a Member of Metfriendly and is subject to our Rules, which are available on our website or on request from us.

The plan will not commence until a valid application has been received AND a contribution has been made or set up (unless there is a Child Trust Fund transfer in progress).

The child named in 'Details of Child' will be the beneficial owner of the Junior ISA Plan.

National Insurance No. (if child is 16 or 17)

For the 2024/2025 tax year

Open Junior ISA with a lump sum deposit of (£1,500 minimum)

Open Junior ISA with a monthly contribution of (£30 minimum)

Metfriendly Escalator

Each year, the Metfriendly Escalator will automatically increase your monthly contributions, until you tell us to stop. This increase will take place each April starting in the following calendar year. For example, if you start your plan at £100 per month from September and set the escalator to £10, your monthly contributions will automatically increase to £110 per month the next April, and increase by the same amount each year afterwards.

You can vary, add a lump sum, stop or restart your monthly contributions at any time.

Escalation amount £10 £20 £50 £75 £100 Other

Relationship to Child

Details of Payer (if different from parent/legal guardian).

If not a current Member of Metfriendly, please tick to confirm that you have enclosed your proof of ID and home address, and that you have signed the reverse of the copies to confirm they are a true copy of the original.

Mr/Mrs/Ms/Miss	Surname	Forename(s)		
First line of home address				Postcode
		Date of Birth	<input type="text"/>	<input type="text"/>
Email Address		Preferred Contact No		

Payer Authority

I authorise the deduction from my salary (serving members only) or bank account of all premiums due. (If you wish to pay us by Direct Debit please call us or email info@metfriendly.org.uk.)

Signed	Date
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Confirming Your Identity

To process your application, Metfriendly will refer to Credit Reference Agencies to confirm your identity. This search will leave a 'footprint' on your credit file, which is required to record that the check has taken place. This footprint is not the same as a credit check footprint and has no negative impact on your file. Please read the following:

ID Declaration

I understand that you will undertake a search with a Credit Reference Agency to verify my identity. To do so, the Credit Reference Agency may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained. The Credit Reference Agency may disclose that information, and the fact a search was made to its other customers for the purposes of assessing the risk of giving credit, to prevent fraud, money laundering and to trace debtors. A record of the search will be retained by the Credit Reference Agency.

Declaration & Authorisation**I declare that:**

- I am 16 years of age or over.
- I am the child/I have parental responsibility for the child (delete which does not apply).
- I/the child does not have a Child Trust Fund Account (or the Child Trust Fund is being transferred to Metfriendly and a transfer form has been completed).
- I will be the registered contact for the Junior ISA.
- The child is resident in the UK.
- I have not subscribed and will not subscribe to another stocks & shares Junior ISA for this child.
- I am not aware of any other stocks & shares Junior ISA held by this child.
- 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 result in the subscription limit being exceeded.
- The personal details in this application are true.

I authorise Metfriendly:

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.

Declaration

- I hereby apply for the Metfriendly Stocks & Shares Junior ISA on behalf of the named child, and accept the terms and conditions as described within the product literature and elsewhere within this application. I confirm I have also read the Key Information Document.
- On behalf of the named child, I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless they are already a Member) and I agree on behalf of the child to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appears on the website metfriendly.org.uk and are available in printed form upon request).

Signed	Date	Promotional Code
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To be signed by Parent/Legal Guardian

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between the applicant (on behalf of the child) and us. We will share the registered contact's data with our mailing house partners (see our privacy notice) to send legally required documents such as the annual benefit statement and invitation to our Annual General Meeting. The data will only be kept for such a time needed to perform these tasks. Where possible, we use external information to verify your identity and keep our records up to date on home address changes. We use a third-party provider to deliver our marketing emails. We gather statistics around email open rates and clicks using industry-standard technologies. For more information, please see our privacy notice at metfriendly.org.uk/privacy

How did you hear about Metfriendly?

I am a Member Newsletter I received a letter Brochure stand Intranet Received an email
Personal recommendation Internet search X Facebook LinkedIn I spoke to a Metfriendly representative
I saw an advert - please state which publication Other - please state

Publication/Other

Contact Details

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