



nucleus^o platform

Third party subscription to a Junior ISA form

Please complete this form in BLOCK CAPITALS and return it by:

- **post** to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- **secure message** via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

Using this form

Please complete this form if you wish to make a single subscription to a Junior ISA but you are not the ISA holder or the legal guardian for the child.

The Junior ISA is classed as a stocks and shares ISA under the legislation. For the current tax year, the Junior ISA allowance is £9,000.

Any money received will be applied to the ISA product bank account pending any investment instructions.

Please note that the third party is not selecting where the payment is to be invested. Any investment decisions should be instructed by the ISA holder, their legal guardian and/or their adviser.

Data protection

You can access full details on what to expect when we process your personal data in our Privacy Notice document, which is available on our website at nucleusfinancial.com.

Section 1 - Child's personal details

Title

First name(s)

Surname

Date of birth (DD/MM/YYYY)

Nucleus ISA product number

Permanent residential address

Postcode

National Insurance number

OR

They don't have a National Insurance number

Section 2 - Third party's personal details

Title

Forenames (s)

Surname

Date of birth (DD/MM/YYYY)

Permanent residential address

Postcode

Telephone number

Relationship to the child

Section 3 - Payment details

I wish to pay a subscription to the Junior ISA by electronic bank transfer.

Please note the required bank details and payment reference are available from the ISA holder via their online platform account.

Payment amount (£)

Section 4 - Third party declaration

I confirm that I am the person named in Section 2 of this form, and that I have been given authority to make a subscription to the product of the customer named in Section 1.

I accept that my personal data will be held by Nucleus in accordance with the Privacy Notice.

I declare that, to the best of my knowledge and belief, the particulars given on this form are correct and complete, and I undertake to inform Nucleus, without delay, if there are any changes in the information contained in this form.

Signature of third party

Print name

Date (DD/MM/YYYY)



03455 212 414



ask@nucleusfinancial.com



nucleusfinancial.com

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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