# Junior ISA Regular Savings Plan Amendment Form



Any applications received that are not completed correctly may incur delays or may have to be returned to you. You must read all the information in Section 3 and 5 before completing this application form. Please complete in BLOCK CAPITALS using BLACK INK.

1 Personal Details & Legal Requirements
Account Holder (Child) Please note that all correspondence will be sent to the Registered Contact
JUNIOR ISA ACCOUNT NUMBER
TITLE SURNAME
FIRST NAME(S) IN FULL
ADDRESS HOUSE NUMBER AND/OR HOUSE NAME
STREET, CITY, COUNTY AND COUNTRY DETAILS POSTCODE
ARE YOU A UK NATIONAL ONLY? (PLEASE MARK AN X IN THE BOX)
ARE YOU A UK NATIONAL AND NATIONAL OF ONE OR MORE OTHER COUNTRIES? (TICK BOX AND LIST ALL OTHER COUNTRIES BELOW)
ARE YOU A NATIONAL OF NON-UK COUNTRIES ONLY? (TICK BOX AND LIST ALL OTHER COUNTRIES BELOW)
NATIONALITY 1 NATIONALITY 2
NATIONALITY 3 NATIONALITY 4
<b>Details of Payer</b> Please mark in the box below if you are the Registered contact (Guardian / Parent) or Third party payer)

REGISTERED CONTACT (	(GUARDIAN / PARENT)
THIRD PARTY PAYER	
TITLE	SURNAME
FIRST NAME(S) IN FULL	

PLEASE TURN OVER

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## Personal Details & Legal Requirements (continued)

1

ADDRESS HOUSE NUMBER AND/OR HOU	SE NAME					
STREET, CITY, COUNTY AND C	OUNTRY DETAILS	F	POSTCODE			
CONTACT TELEPHONE NUMBE	ER (in case of query) DAT	IE OF BIRTH				
ARE YOU A UK NATIONAL ONL	Y? (PLEASE MARK AN X IN THE BOX)					
ARE YOU A UK NATIONAL AND I	NATIONAL OF ONE OR MORE OTHER CO	JNTRIES? (TICK BOX AND LIST ALL (	OTHER COUNTRIES BELOW)			
ARE YOU A NATIONAL OF NON	-UK COUNTRIES ONLY? (TICK BOX AND I	LIST ALL OTHER COUNTRIES BELO	W)			
NATIONALITY 1		NATIONALITY 2				
NATIONALITY 3		NATIONALITY 4				
SOURCE OF THIS INVESTMENT	r					
DUE TO REGULATORY REQUIR BEFORE WE CAN ACCEPT YOU	EMENTS WE MUST OBTAIN INFORMATI IR APPLICATION.	ON ABOUT THE SOURCE OF YOUR	R CONTRIBUTIONS			
INCOME FROM SALARY	DIVORCE SETTLEMENT	SALE OF PROPERTY	INHERITANCE			
GIFT	SALE OF INVESTMENT/ TRANSFER	SAVINGS FROM INCOME				

OTHER - PLEASE SPECIFY:

### 2 Details of your <u>REVISED</u> Regular Savings Plan - effective from the next available collection date

**Note:** The new details provided in this section will override any existing Regular Savings Plan set up to collect from the bank account specified in Section 3. There is a regular minimum investment of £25 for each fund and £50 for each application. To find the correct fund code, please visit fidelity.co.uk/funds. Your fund choice will be derived by the Fund Code that you enter and not the Fund Name.

If you wish to keep your regu	F	EGULAR SAVINGS £	
lf you wish to change your re	gular savings amount, please enter the amount in £.		
FUND CODE	FUND NAME	F	REGULAR SAVINGS %
	Cash		
Change of Bank Details? If complete the new details be	you wish to change the bank account details used for your Direct Debit you must elow in Section 3. TO		100%

Should you wish to invest in brokerage assets, then please specify cash at this point. Then you can use our online service to purchase brokerage investments using that cash. We do not offer regular savings direct into brokerage assets. Should any of your new funds pay income, we will follow your existing preferences for income payments on your account. You will find further income options available online. Please go to Fidelity.co.uk for more details.

#### 3

#### **Mandate Details**

Please make sure that you sign and date the instruction below.

Please fill in the whole form using a ballpoint pen and send to: Fidelity, PO Box 391, Tadworth, KT20 9FU.	nstruc soc	ction t iety t	-				-		D	DIR Del	ECT
Name and full postal address of your bank or building societ		Service	User Nu	nber							
To: The Manager Bank/building	society	4	4	6	1	3	8				
Address											
Postcode		Referen	ce								
Posicoue											
Name(s) of account holder(s)											
		Please p detailed	ay Finan in this ins	cial Adm	inistration subject to	ng societ Services the safe this instru	Ltd Dire	sured I	y the D	irect	
Bank/building society account number		Administ		rvices Lt		so, details					
		Signature	e(s)								
Branch sort code											
		Date									
Banks and building societies r	may not ac	cept Direc	ct Debit ir	structior	ns for son	ne types c	of accoun	t			DDI2

PLEASE TURN OVER

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#### 4

#### **Important Documents**

Before investing please make sure you read and save or print the current version of:

- The Key Features Document Doing Business with Fidelity incorporating the Fidelity Client Terms.
- The key information document applicable to your investment.
- The illustration document.
- The Investment Trusts Key Features Document for investments in these products.

Important Notice: If you have not received one or all of the documents listed above relating to the fund(s) you wish to invest in, please go to fidelity.co.uk or contact us on 0800 41 41 61 Monday to Friday 8am to 6pm and Saturday 9am to 6pm.

#### 5

### **Declaration and Registered Contact Signature**

I declare that:

- I have read the latest Key Features Document Doing Business with Fidelity.
- I have read the latest key information document.
- I have read the latest illustration document.
- I have read the latest Investment Trusts Key Features Document.

X

- I accept the Fidelity Client Terms.
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.

SIGNATURE AND DATE (YOU MUST SIGN HERE - Please ensure all relevant sections are completed as per the instructions on this form)

REGISTERED CONTACT

