



# 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

### Details of Payer

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



1

# Personal Details & Legal Requirements (continued)

ADDRESS  
HOUSE NUMBER AND/OR HOUSE NAME

[Grid of 16 boxes for house number and name]

STREET, CITY, COUNTY AND COUNTRY DETAILS

[Large text box for street, city, county and country details]

POSTCODE

[Grid of 7 boxes for postcode]

CONTACT TELEPHONE NUMBER (in case of query)

[Grid of 12 boxes for contact telephone number]

DATE OF BIRTH

[Grid of 8 boxes for date of birth]

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

[Grid of 16 boxes for Nationality 1]

NATIONALITY 2

[Grid of 16 boxes for Nationality 2]

NATIONALITY 3

[Grid of 16 boxes for Nationality 3]

NATIONALITY 4

[Grid of 16 boxes for Nationality 4]

## 2 Details of your REVISED 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](http://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 regular savings amount, please put an X in the box

REGULAR SAVINGS £

[Grid of 6 boxes for regular savings amount in pounds]

If you wish to change your regular savings amount, please enter the amount in £.

FUND CODE

FUND NAME

REGULAR SAVINGS %

[Grid of 5 boxes for fund code]

[Text box for fund name]

[Grid of 4 boxes for regular savings percentage]

[Grid of 5 boxes for fund code]

[Text box for fund name]

[Grid of 4 boxes for regular savings percentage]

[Grid of 5 boxes for fund code]

[Text box for fund name]

[Grid of 4 boxes for regular savings percentage]

[Grid of 5 boxes for fund code]

[Text box for fund name]

[Grid of 4 boxes for regular savings percentage]

[Grid of 5 boxes for fund code]

[Text box for fund name]

[Grid of 4 boxes for regular savings percentage]

[Grid of 5 boxes for fund code]

Cash

[Grid of 4 boxes for regular savings percentage]

Change of Bank Details? If you wish to change the bank account details used for your Direct Debit you must complete the new details below in Section 3.

TOTAL    %

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](http://Fidelity.co.uk) for more details.

PLEASE TURN OVER

### Mandate Details

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



**Fidelity**<sup>™</sup>  
INTERNATIONAL

### Instruction to your bank or building society to pay by Direct Debit



Please fill in the whole form using a ballpoint pen and send to:  
Fidelity Personal Investing, PO Box 80, Tonbridge, TN11 9YA.

**Name and full postal address of your bank or building society**

|                 |                       |
|-----------------|-----------------------|
| To: The Manager | Bank/building society |
| Address         |                       |
| Postcode        |                       |

**Name(s) of account holder(s)**

**Bank/building society account number**

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**Branch sort code**

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**Service User Number**

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| 4 | 4 | 6 | 1 | 3 | 8 |
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**Reference**

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**Instruction to your bank or building society**

Please pay Financial Administration Services Ltd 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 Financial Administration Services Ltd and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date

Banks and building societies may not accept Direct Debit instructions for some types of account

DD12

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### 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.

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### 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.
- 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



|  |  |  |  |   |   |  |  |
|--|--|--|--|---|---|--|--|
|  |  |  |  | 2 | 0 |  |  |
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If you have any queries about this form please visit [fidelity.co.uk](http://fidelity.co.uk) or telephone 0800 41 41 61. Please send your completed form to Fidelity International (IMS), PO Box 80, Tonbridge, TN11 9YA. Issued by Financial Administration Services Limited, (a Fidelity International company), which is authorised and regulated by the Financial Conduct Authority.