

Junior ISA Change of Registered Contact Form

- Please complete this form in ink using **BLOCK CAPITALS** or complete electronically.
- Supporting evidence will need to be provided in all circumstances apart from when the child is becoming the registered contact.
- All original copies of documents must be sent along with the form to: **Fundsmith, PO Box 10846, Chelmsford, CM99 2BW.**
- If you choose to provide certified copies, you can send these along with the form to: **enquiries@fundsmith.co.uk.**
- If you wish to courier the form please send it to: **Fundsmith LLP, Adams House, 2 Springfield Lyons Approach, Chelmsford, Essex, CM2 5LG.**

If you have any questions our team is available to assist you and can be reached via:

- **Webchat:** Visit our website to connect with a member of our team.
- **Phone:** 0330 123 1815 (or +44 1268 448659 if calling from overseas) or;
- **Email:** enquiries@fundsmith.co.uk

JISA details

Fundsmith JISA account number

Name of account holder

Existing Registered Contact details

First names

Surname

Date of birth

DD/MM/YYYY

Permanent residential address

Postcode

Email

New Registered Contact details

First names

Surname

Date of birth

DD/MM/YYYY

Permanent residential address

Postcode

Email

Telephone number

Mobile number

Reason for change of registered contact

Please indicate the reason below. In all circumstances apart from the child becoming the registered contact, we require evidence of the new registered contact's parental responsibility or legal guardianship.

☐

Adoption of child

Please send original or certified copy of adoption papers.

☐

Change in circumstances due to a Court Order (e.g. appointment of Guardian)

Please send original or certified copy of the court order.

☐

Incapacity or Death of existing contact

Please send an original or certified copy of death certificate or evidence of incapacity as well as evidence of parental responsibility for the new registered contact. .

☐

Child aged between 16-18 is to take management responsibility

☐

The existing registered contact can no longer be contacted

Please provide details below.

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Any other reason for change in registered contact

Please provide details below.

Details

Declaration

I declare that:

- I am 16 years of age or over.
- I am the child/I have parental responsibility for the child and will be the registered contact for this JISA. (delete as appropriate).
- I am NOT and the child is NOT a U.S. Person i.e. resident in the United States of America and I will notify Fundsmith LLP immediately in the event that I or the child become a U.S. Person. I understand that the Fundsmith Equity Fund, Fundsmith Stewardship Fund and Smithson Equity Fund are not available to U.S. persons.
- I am not aware of other JISA subscriptions that will result in JISA subscriptions for this child exceeding the annual limit.
- I have not subscribed and I will not knowingly make subscriptions to JISAs for this child that will, when aggregated with other subscriptions, result in the overall subscription limit being exceeded for the tax year in which this application is made and in any subsequent tax year.
- I have a copy of the Key Investor Information Documents, Fund Prospectuses, Sustainability Disclosure Documents, and Supplementary Information Document, including the Fundsmith JISA Terms & Conditions and have kept them for my records. I consent to Fundsmith LLP providing these Documents via the Fundsmith website.
- I agree to the JISA Terms and Conditions and accept that these may be varied in accordance with their terms.
- I confirm that to the best of my knowledge and belief the information in this form is true.
- I acknowledge that the Fundsmith Equity Fund, Fundsmith Stewardship Fund and Smithson Equity Fund do not have UK sustainable investment labels as they do not have sustainability goals. Sustainable investment labels help investors find products that have a specific sustainability goal.
- I acknowledge that any subscription will be treated as a gift to the child and cannot be paid back to the payer.

I authorise Fundsmith LLP:

- To hold the subscriptions, JISA investments, interest, dividends, and any other rights or proceeds in respect of those investments and any other cash.
- To make on the child's behalf any claims for tax relief related to JISA investments.

Data protection

- I acknowledge that Fundsmith will process any personal data that is provided or is otherwise obtained in connection with this Application Form in accordance with Fundsmith's data protection policy, a copy of which is set out in the Supplementary Information Document.
- To the extent that Fundsmith receives any special category data in connection with the processing of this Application Form (including, for example, identification documentation from which my racial or ethnic origin, or the racial or ethnic origin of the child (as applicable) may be identified) I acknowledge that the lawful basis upon which this processing shall be carried out shall be as set out in the Supplementary Information Document (as updated and amended from time to time).

☐ Please tick this box if you wish to receive marketing communications via email and post from Fundsmith.

Signature

Date