Junior Stocks and Shares ISA Illustration request

When to use this form

You only need to complete this form if you're requesting a **new JISA illustration for a junior individual who already has a Junior SIPP on the platform.**

You should **not** use this form: For JISA top-up or review illustrations. For junior individuals who are new to the platform and can use the online JISA journey.

Please complete this form in full and send it to clientservices@wealthtime.com or submit it via the Adviser Zone secure email. If you need help completing this form, please contact the client services team on 0345 680 8000.

1. Adviser Details

Firm name:

Adviser name:

Firm FCA number:

2. Eligible Child Details

Existing JISA wrapper number (if known):

Title:

Surname:

Forename(s):

Date of birth: (dd/mm/yyyy) ☐ Male ☐ Female

3. Investments

Regular Investments will continue until the last possible collection period before the Eligible Child is 18 unless you instruct Wealthtime to cease taking payments.

Single Investment: £

Transfer: £

Regular Investment amount: £ ☐ Monthly or ☐ Annually

4. Adviser Charge and DFM Fee (if Applicable)

Adviser Charge on Initial Investment* % or £

Adviser Charge on Regular Investment* % or £

Adviser Charge on Transfer* % or £

Ongoing Adviser Charge** % or £ per annum to be paid

☐ Monthly ☐ Quarterly ☐ Annually

Discretionary Fund Manager Charge % per annum

*Maximum initial Adviser Charge is 5% pa of the Initial and Regular Investment amounts.

**The maximum ongoing Adviser Charge is 2% pa of the policy value at the time of taking the charge. If a higher figure is recorded on this application, the maximum will be applied.

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5. Initial Investment Instruction

Unless you tell us otherwise, we automatically buy accumulation units/shares. Where accumulation units/shares have been stated but are not available, we will buy income units/shares. Where income units/shares have been stated but are not available, we will buy accumulation units/shares. All purchases are subject to sufficient cleared funds.
Please ensure that your choices total 100%, otherwise your investment will be held in your Cash Facility until the choices are confirmed.

Model name:

or

ISIN/Sedol	Name of Investment*	Inc/Acc	%
	Cash (Minimum 1%)		1
		Total	100%

* Please write the names in full as listed on our Investments List.
The list and fact sheets can be found at www.wealthtime.com

If you require this document in an alternative format please contact us.