

OFFICE USE ONLY	Member No	Policy No	Prop No	Proposal Input
				Policy Doc Input
PFA/IFA	Introducer	Date of Entry	Date of Maturity	New Bus Doc Chkd

RED ROSE ASSURANCE
Making Mutuality Meaningful

I apply to open a **Red Rose Friendly JISA** for:

Personal Details of CHILD

Please complete fully in block capitals

Title	Surname
Forenames	
Address	
	Postcode
Child's NINO(if they have one)	
Child's Date of Birth	

Personal details of APPLICANT

Title	Surname
Forenames	
Address	
	Postcode
Home Telephone Number	Date of Birth
Mobile Telephone Number	
Email Address	

I apply to subscribe to a Red Rose Assurance Stocks and Shares JISA for the tax year

And each subsequent tax year until further notice, in accordance with the Terms and Conditions

I wish to invest

Regular Monthly Premium (min £10) Lump -sum (min £50) in the Shariah ISA OR With profits ISA

tick one box only

Declaration

I declare that :

I am 16 years of age or over **I am the child/ I have parental responsibility for that child (delete which does not apply)**

I/the child does not have a Child Trust Fund account

I will be the registered contact for the JISA

The child is resident and ordinarily resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married

to/in a civil partnership with a UK Crown servant

I have not subscribed and will not subscribe to another JISA of this type for this child

I am not aware that this child has another JISA of this type

I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit

I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded

I authorise Red Rose Friendly Society Limited

a) to hold the child's subscriptions, JISA investment, interest, dividends and any other rights or proceeds in respect of those investments and cash and

b) to make, on the child's behalf, any claims to relief from tax in respect of JISA investments

I agree to the JISA terms and conditions and confirm that to the best of my belief the information of this form is true.

Signed

Date

General Data Protection Regulation (GDPR): We take your privacy seriously and will only use your personal data to administer the policy and provide products and services you have requested from us. Full details of our GDPR policy and the Privacy Statement can be found on the website. You must sign our GDPR Document before we can process your application.

This product meets the demands and needs of those who wish to invest a regular monthly amount and/or lump sum over the medium to long term (considered to be 5 years or more) in a with profits fund in a child's name.

Please ensure that all questions are answered.

FOR OFFICE USE ONLY	
I Recommend that this proposal be accepted	<input type="checkbox"/> Yes <input type="checkbox"/> No
Reason	
Special terms & conditions	
Signed	Date

Exit Mode
Exit Date
Amount Paid
Claim No

FREE POLICY
Lapse Date
Lapse Value
WDL Date
WDL No

The Red Rose Friendly Society Limited, Parkgates, 52a Preston New Road, Blackburn, Lancashire BB2 6AH

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Established 1863 Incorporated under The Friendly Societies Act 1992 Reg No. 43 Coll Authorised by the Prudential Regulation Authority

and regulated by the Financial Conduct Authority and the Prudential Regulation Authority