Investment Account application on behalf of a child under 16

ns&i

- Please complete this form if you want to open an NS&I Investment Account on behalf of a child under 16.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster.

Who can open an Investment Account on behalf of a child under 16?

The account can be opened by a parent/guardian, grandparent or great-grandparent.

Does the child already have an Investment Account?

If you want to deposit more money into the child's Investment Account, please use the simpler Investment Account deposit form. You can download it from **nsandi.com/forms** or call us and we'll send you one.

1 Your initial deposit

amount £ ☐☐☐☐☐☐☐ ☐☐ p minimum £20, maximum £1 million per person

You can pay it by cheque or by switching from another NS&I account (see section 2).

2a Paying by cheque

Give details of the account on which your cheque is drawn.

name of account holder

account number

sort code ☐☐ – ☐☐ – ☐☐

2b OR by switching from another NS&I account

The NS&I account you switch from must be in the child's name and one you are responsible for as their parent or guardian. If you switch from a fixed term investment that's not on sale, you won't be able to switch back.

type of NS&I account switching from

account number or holder's number

If this is a fixed term investment, do you want to defer the switch until the maturity date? (You can only do this within 30 days of its maturity.)

yes ☐ no ☐ **A penalty may apply if you cash in all or part of a fixed term investment before its maturity date.**

If the amount you are switching will take the balance on the account below the minimum allowed, you must mark that you want to close the account.

If you want to close the account you are switching from, mark here ☒

If you choose to close it, we'll automatically repay any remaining balance after the switch to its nominated bank or building society account on our records. Or, if we don't hold this, the account you nominate in section 6.

3 Child's details

Please complete in full.

title

date of birth D D M M Y Y Y Y

surname

forenames in full

address

postcode

country

nationality

If the child is resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

If the child is resident for tax purposes in any country or territory outside the UK, please complete the fields below.

city of birth

country of birth

tax country

tax identification number

4a Parent's/guardian's details

Please give details of the child's parent or guardian who will look after the Investment Account. We'll send any correspondence to them.

title

date of birth D D M M Y Y Y Y

surname

forenames in full

address

postcode

country

nationality

phone number

Preferably a mobile so we can reach them more easily.

Please complete the next page and sign ▶

4b Parent's/guardian's previous address

Only complete if the parent or guardian has lived at their current address for less than three months.

address

postcode

5a Grandparent's/ great-grandparent's details

Only complete if you are applying on behalf of your grandchild or great-grandchild.

title

date of birth D D M M Y Y Y Y

surname

forenames in full

address

postcode

country

nationality

phone number

Preferably a mobile so we can reach them more easily.

5b Grandparent's/ great-grandparent's previous address

Only complete if you are applying on behalf of your grandchild or great-grandchild and have lived at your current address for less than three months.

address

postcode

6 Parent or guardian's nominated bank or building society account details

If the parent or guardian in section 4a wants withdrawals paid directly to their account, please give its details here. We recommend this for speed and security.

If it's an NS&I Direct Saver or Investment Account, just write 'NS&I' in the 'bank/building society' field, complete the 'name in which account is held' field and write the account number in the 'bank reference or building society roll no' field.

bank/building society name in which account is held

account number

sort code – –

bank reference or building society roll no (if applicable)

Please be careful when providing the bank details. If you enter the wrong details any withdrawals might be delayed, or credited to the wrong account, and may result in a financial loss.

7 Your signature

It is important that you read and understand the section entitled '**How we use your information**' in our terms and conditions.

Declaration:
I have read and accept the terms and conditions dated **13 January 2018**.

signature

date D D M M Y Y Y Y

We'd like to contact you occasionally with offers from NS&I. If you'd rather not receive these, please write to NS&I, Glasgow, G58 1SB.

8 What to do next

Send your completed form to FREEPOST NS&I SALES.
If paying by cheque, make it payable to 'National Savings and Investments'.