

## **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.
  - 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](http://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  
application reference number  You can pay it by cheque or by switching from another NS&I account (see section 2). If paying by cheque, write the application reference number on the back.

<p><b>2b OR by switching from another NS&amp;I account</b></p> <p>type of NS&amp;I account switching from account number or holder's number</p> <p>If the amount you are switching will take the balance on your account below the minimum allowed, you must mark that you want to close the account.</p>	<p>The NS&amp;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.</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%; margin-top: 10px;"></div> <p>If you want to switch from a fixed term investment, there are some restrictions. Please check the customer agreement (terms and conditions) for the investment you're switching from before you apply.</p> <p>If you are switching from a fixed term investment, do you want to defer until it matures? (You can only defer within 30 days before the maturity date.)</p> <p>yes <input type="checkbox"/> no <input type="checkbox"/> <b>A penalty may apply if you cash in all or part of a fixed term investment before its maturity date.</b></p> <p><b>If you want to close the account you are switching from, mark here <input type="checkbox"/></b></p> <p>If you choose to close it, we'll automatically repay any remaining balance after the switch to your nominated bank or building society account on our records. Or, if we don't hold this, the account you nominate in section 6.</p>
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<b>3 Child's details</b>	<b>title</b>	<input type="text" value="   "/>	<input type="text" value="  "/>	<input type="text" value="  "/>	<input type="text" value="  "/>	<input type="text" value="  "/>	<b>date of birth (this is essential)</b>	<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
<b>Please complete in full.</b>													
	<b>surname</b>	<input type="text" value="  "/>											
	<b>forenames in full</b>	<input type="text" value="  "/>											
	<b>address</b>	<input type="text" value="  "/>											
		<input type="text" value="  "/>											
	<b>postcode</b>	<input type="text" value="  "/>	<input type="text" value="  "/>	<input type="text" value="  "/>	<input type="text" value="  "/>	<input type="text" value="  "/>	<b>country of residence</b>	<input type="text" value="  "/>					
	<b>nationality</b>	<input type="text" value="  "/>											
<i>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.</i>	<b>If the child is resident for tax purposes in any country or territory outside the UK, please complete the fields below.</b>												
	<b>city of birth</b>	<input type="text" value="  "/>											
	<b>country of birth</b>	<input type="text" value="  "/>											
	<b>tax country</b>	<input type="text" value="  "/>											
	<b>tax identification number</b>	<input type="text" value="  "/>											

Please complete the next page ►

<b>4 Parent's/guardian's details</b>	title	[ ]	date of birth (this is essential)	[ D D M M Y Y Y Y ]
<i>Please give details of the child's parent or guardian who will look after the Investment Account. We'll send any correspondence to them.</i>	surname	[ ]		
	forenames in full	[ ]		
	address	[ ]		
		[ ]		
	postcode	[ ]	country of residence	[ ]
	nationality	[ ]		
	phone number	[ ]	Preferably a mobile so we can reach them more easily.	

<b>5 Grandparent's/great-grandparent's details</b>	title	[ ]	date of birth (this is essential)	[ D D M M Y Y Y Y ]
<i>Only complete if you are applying on behalf of your grandchild or great-grandchild</i>	surname	[ ]		
	forenames in full	[ ]		
	address	[ ]		
		[ ]		
	postcode	[ ]	country of residence	[ ]
	nationality	[ ]		
	phone number	[ ]	Preferably a mobile so we can reach them more easily.	

<b>6 Parent or guardian's nominated bank or building society account details</b>	If it's an NS&I Direct Saver, 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.			
<i>If the parent or guardian in section 4 wants withdrawals paid directly to their account, please give its details here. We recommend this for speed and security.</i>	bank/building society	[ ]		
	name in which account is held	[ ]		
	account number	[ ]	sort code	[ ] - [ ] - [ ]
	bank reference or building society roll no (if applicable)	[ ]		
	<b>Please be careful when providing the bank details. If you enter the wrong details any withdrawals you make might be delayed, or credited to the wrong account, and may result in a financial loss.</b>			

<b>7 Your signature</b>	<b>Declaration:</b> I have had the opportunity to read the customer agreement (terms and conditions) dated <b>13 December 2021</b> .
signature	[ ]
	date [ D D M M Y Y Y Y ]

**Your marketing preferences**  
We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

by post  by phone  by email  online

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

<b>8 What to do next</b>	<ul style="list-style-type: none"> <li>Remember to sign and date your form, then send it to: <b>NS&amp;I, Sunderland SR43 2SB</b></li> </ul>
	If paying by cheque make it payable to 'NS&I'.