



For Customers | Aegon Platform

# Aegon Junior ISA top up form

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please call 0345 604 4001 (call charges will vary) or visit [aegon.co.uk/additionalsupport](https://aegon.co.uk/additionalsupport)

In this form, 'I', 'me', 'you', 'your' or 'my' refers to the registered contact named in section 2, and 'Aegon', 'we', or 'our' refers to Cofunds Limited.

Use this form to top up an existing Aegon Junior ISA ('Aegon JISA') on behalf of a child who is under 18 and living in the UK, or if you are the child and aged between 16 and 18 and have applied to become the registered contact and your application has been accepted. The overall JISA allowance is £9,000 for the 2024/2025 tax year.

You must have been provided with an illustration, together with the Aegon JISA Key Features Document, Key Investor Information Document (KIID), (or Key Information Document), and any relevant consumer-facing sustainability disclosure report for each fund you are investing in before completing and returning this form. If you haven't we will not be able to process your request. Please go to [aegon.co.uk/support](https://aegon.co.uk/support) to download the form **Illustration request – Aegon GIA and Aegon ISA**. We'll send you the relevant documents along with your illustration.

**Please complete this form in BLOCK CAPITALS and in ballpoint pen and return it and any additional information to: Aegon Cofunds Administration, Sunderland SR43 4DN.**

Whenever you see this icon \*, you may have to send us additional information.

## 1. Child details

Illustration number

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1.1 Product number

8																			
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Mr / Mrs / Miss / Ms / Other - please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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Permanent residential address

Postcode

1.2 Please tell us:

National Insurance number - (if the child is over 16 and holds one)

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You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, or a letter from the DWP.

The child doesn't have a National Insurance Number



### 3. Top-up details – continued

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#### 3.2 Third Party Details

Complete this section if you're not the child or registered contact but are funding the Aegon JISA. Aegon customer number (if applicable).

3									
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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Permanent residential address

Postcode

### 4. Source of wealth

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Your source of wealth is how you got the money to invest, for example from regular savings from your salary, selling a property or an inheritance payment. Your source of funds is the details of the bank account that your money to invest comes from.

Source of funds

Source of wealth





## 7. Adviser details (for adviser use only)

Adviser name

Firm name

If you'd like to take an ad hoc adviser charge for this transaction, or amend your client's ongoing adviser charge or service charge, use your Aegon Platform account.

## 8. Registered contact declaration

**In this declaration:**

I declare that:

- 8.1 I accept that any payment into the Aegon JISA, including subscriptions and transfers, will be placed in the appropriate cash facility. Thereafter, investments will be purchased in accordance with the investment instructions given by me in section 5 of this additional application form.
- 8.2 I am not aware of other JISA subscriptions that will result in the child named in section 1 of this additional application form exceeding the annual limit as determined by HMRC.
- 8.3 I will not knowingly make subscriptions to JISAs for the child named in section 1 of this additional application form that will result in the subscription limit being exceeded.
- 8.4 The information supplied in this application, and any supplementary forms related to it, including transactional data, is correct and complete to the best of my knowledge and belief. I am aware that it is a serious offence to knowingly provide false or misleading information on the application.

- 8.5 I have read the Aegon JISA key features, Aegon Platform terms and conditions, Aegon JISA supplement, Key Investor Information Document(s) (KIID(s)), (or Key Information Document), and any relevant consumer-facing sustainability disclosure report relating to the funds I would like to invest in.

I agree that:

- 8.6 Where I have indicated in section 5 of this additional application form that I wish to set up a default investment strategy, this single payment and any future single payments to the Aegon JISA will be invested in accordance with the default investment strategy until I advise Aegon otherwise.
- 8.7 Aegon will apply my investment income instructions in accordance with section 6 of this additional application form, and where I have not provided an instruction I acknowledge that you will apply the default position, which is to reinvest the income.

Date

D	D	M	M	Y	Y	Y	Y
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Registered contact signature

X		X
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