Application Form – Junior Cash ISA (UK individuals only)

The Stafford Building Society

Account Details – All sections marked with * are compulsory fields.

I apply to subscribe to a Junior Cash ISA (JISA) for the tax year 2026 / 2027 and each successive year until further notice (this does not mean that you are obliged to subscribe to your ISA in each successive year).

*I hereby apply for a	Account
*Opening deposit amount	
*Source/Origin of funds	
*Initial investment paid by	Cheque ☐ Cash ☐ Bank Transfer ☐ Debit Card ☐ JISA Transfer In ☐ Child Trust Fund Transfer In ☐
	☐ Please transfer funds from my existing SRBS account (account number) ☐☐☐☐-☐☐☐☐☐-☐
*What are you saving for?	
*Roughly, how often do you plan to use your account?	Daily ☐ Weekly ☐ Fortnightly ☐ Monthly ☐ Annually ☐ Less often than annually ☐
*Where will future deposits come from?	

Account Holder(s) Details

ACCOUNT HOLDER (Child as Beneficiary)		**TRUSTEE** (Registered Contact)	
*Title		*Title	
*First name(s)		*First name(s)	
*Surname		*Surname	
*Address		*Address	
Date moved to this address	M M Y Y Y Y	Date moved to this address	M M Y Y Y Y
Previous address, if you have lived at your current address for less than 3 years		Previous address, if you have lived at your current address for less than 3 years	
Date moved to this address	M M Y Y Y Y	Date moved to this address	M M Y Y Y Y
*Date of birth		*Date of birth	
*Country of Birth		*Country of Birth	
*National Insurance Number (If over 16)		*National Insurance Number	
*Telephone		Marital status	
Email		*Telephone	
*Nationality		Email	
*Country of residence		*Occupation	
*Are you a tax resident in any other country? (If **YES**, please state where & complete the supporting FATCA declaration leaflet	Yes ☐ No ☐	Name of employer or your business name	
		*Nationality	
		*Country of residence	
*If **YES**, please include your Tax Identification Number (TIN) (if aged 16 or over)		*Are you a tax resident in any other country? (If **YES**, please state where & complete the supporting FATCA declaration leaflet	Yes ☐ No ☐
		*If **YES**, please include your Tax Identification Number (TIN)	

The Stafford Building Society is a trading name for the Stafford Railway Building Society. The Stafford Railway Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Register Number 206063

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Do you need additional support?

We want every Member to feel supported. If there's anything we can do to make things easier for you, for example, if you're living with a **health condition, disability, or other personal circumstances**, please let us know so we can support you in the way that works best for you.

If you'd like a member of our team to get in touch, please tick below and select your preferred contact method – phone or email. We'll follow up as soon as possible to understand your needs and discuss how The Stafford Building Society can best support you.

Contact me via telephone to discuss your support needs	Account Trustee ☐
Contact me via email to discuss your support needs	Account Trustee ☐

Communications from the Society

Here at The Stafford Building Society ('Society', 'we'), we take your privacy seriously and will only use your email address to send you important updates about your account and membership. This includes essential information such as service notifications, changes to terms, Member events and Annual General Meeting (AGM) information. These communications are part of your membership and cannot be opted out of. If a valid email address is not provided, any major updates will be sent via post. If you contact the Society by email, please send any personal data securely.

You can also choose to receive marketing and community updates, which may include information about new Society products, Member offers or news about the Society's community initiatives.

Marketing Preferences

You can change or cancel your choices at any time by contacting us at The Stafford Building Society, 4 Market Square, Stafford, ST16 2JH.

I confirm that the Society can contact me for marketing purposes:

Account holder (Child)

☐ Post ☐ Email ☐ Telephone ☐ No Marketing

Account Trustee (Adult)

☐ Post ☐ Email ☐ Telephone ☐ No Marketing

Disclosure of Relationships

Do you currently work for the Society?	☐ Yes ☐ No
Are you related to anyone who works for the Society?	☐ Yes ☐ No

If you ticked "YES", what is your relationship?

Staff Member Name	Relationship

Appendix 1 - Important Information - Use of Your Information

For the latest information on how we use your data, please refer to our privacy policy. This can be found on our website (www.srbs.co.uk/privacy-policy) or by asking for a physical copy from the branch staff.

Appendix 2 - Charitable Assignment Scheme

IF YOU HAD A SHARE ACCOUNT WITH THE SOCIETY ON 31st JULY 2000 AND HAVE HELD A SHARE ACCOUNT WITH THE SOCIETY EVER SINCE THAT DATE, OR IF YOU HAVE A MORTGAGE WITH THE SOCIETY AT TODAY'S DATE THE WORDING IN PARAGRAPHS 1 AND 2 BELOW DOES NOT APPLY TO YOU. HOWEVER, IT MUST NOT BE DELETED.

1) By applying to open a share account on or after 1st August 2000 I/We agree with the Society and the Charities Aid Foundation ("the CAF") that I/We will assign to the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 31st July 2000 between the Society and the CAF, in which case references to the CAF shall include references to any other charity(ies), but to no other person) the rights to any relevant conversion benefits (defined below).
This obligation will not apply to me/us, if I/We fall within any class of persons, which, as at today's date, the Society wishes to be excluded from such obligation.
This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me/us.
I/We understand that neither the Society nor the CAF will release me/us from this agreement or vary its terms and I/We will continue to be bound by the above condition even if the Society decides at some time in the future (and announces any such decision by press release or otherwise) that it is no longer in the best interests of the Society to continue with the above assignment condition generally in respect of new members.

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2(a) "Relevant conversion benefits" means any benefits to which I/We might become entitled as a shareholding member of the Society under the terms of any future transfer of the Society's business to a company (i.e. on a conversion or takeover) which is completed at any time within the ten years immediately following the date on which my/our share account is opened (or, if applicable, the shorter period as set out in the list available from the Society's Secretary). "Relevant conversion benefits" does not include the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company on a conversion or takeover.

2(b) If the Society merges with any other society, after the date of such merger the "Society" includes such other society.
A list of the classes of persons which the Society currently wishes to be excluded from the obligation to assign or in respect of which a shorter period applies (which list may change from time to time but not with retrospective effect) is available on request from the Society's Secretary.

Agreement and Declaration

We intend to rely on the Specific Terms for this account and the Savings Account Terms and Conditions (Savings T&Cs), which together will form our agreement with you. Our current savings T&Cs are available online at www.srbs.co.uk and are also provided within your account opening pack. Before signing your agreement, for your own benefit and protection you should read the Specific Terms and Conditions for this account, the Savings T&Cs and the declarations below. If you do not understand any point, please ask for further information.

- The child named above will be the beneficial owner of the account investments.

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 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 understand that no money can be withdrawn from this account until my/the child's 18th birthday.
- The information I/we have given on this form is true to the best of our knowledge and belief, and I/we shall inform the Society of any changes in our circumstances.
- I/We agree to be bound by the Rules of the Society, the Society's Terms and Conditions for Savings Accounts and any specific conditions applicable to this account (a copy of which I/we have received).
- I/We have read a copy of the Society's Privacy Notice and have had the opportunity to ask any questions. I/We are aware of how the Society uses our personal data and the rights I/We have under data protection legislation (see Appendix 1).
- I/We have read and understood the information about the Charitable Assignment Scheme (Appendix 2). I/We agree to be bound by the Rules of the Society and the Charitable Assignment Scheme described above, in the application form and in our Savings T&Cs.
- I/We have read and understood the Financial Services Compensation Scheme information sheet and have had the opportunity to read this and ask any questions.
- I/We have read and understood the JISA terms and conditions and agree to be bound by them. I/We have had the opportunity to read them and ask any questions.

I authorise The Stafford Building Society:

- To hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash.
- To make on the child's behalf any claims to relief from tax in respect of JISA investments.

I confirm that to the best of my belief the information in this form is true.

Account holder (child as beneficiary)		**Signed – Trustee (registered contact)**	
*Signature		*Signature	
*Date		*Date	

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