Junior ISA Additional Payment Form

Royal Bank of Scotland

How we will use your information
Before continuing with this application, please read the information which explains how we and others will use your personal and financial information during this application process. When we use and share personal and financial information, we do so on the basis that we have a legitimate interest to prevent fraud and money laundering, to manage our risk and to protect our business and to comply with laws that apply to us (including verifying your identity and assessing the suitability of our products).

For full details about how we use the personal and financial information of our customers, please see our full Privacy Notice at https://www.rbs.co.uk/privacy

Who we are
The organisation responsible for processing your personal and financial information is RBS Collective Investment Funds Limited, a member of The Royal Bank of Scotland Group ("**RBS**").

Topping-up a Junior ISA

You can top-up a Junior ISA in a number of ways:

- To pay by cheque, simply complete this form and send your cheque to us at the address shown on page 2.
- You can top-up by using your debit card or by setting up or amending a Direct Debit. Please either complete this form or call us on 0345 604 4500.

Making a payment

If you require more information about the overall subscription limits before you make an investment please contact us.

To take advantage of the tax efficiencies offered by a Junior ISA, simply complete this form and send your cheque to us at the address shown on page 2 or call us to top-up by telephone.

Contact Us

You can call us on **0345 604 4500**. If you have hearing or speech difficulties please dial Text Relay **18001 0345 604 4500**. Lines are open Monday to Friday 9am to 5.30pm. Calls may be recorded and monitored.

Introduction

Where advice has not been given, we have not assessed the suitability or the appropriateness of this investment for your circumstances, therefore if you wish to proceed with this application you should ensure that you familiarise yourself with the fund(s) and fully consider the nature of the risks involved for the funds you are applying to subscribe to. You should consider carefully the fact that you may be exposing yourself to risks that you may not have the knowledge or experience to assess properly.

Before completing this form, please read:

RBS Stakeholder Fund – Key Investor Information Document (KIID)
Stocks and Shares Junior ISA Supplementary Information Document, specifically the disclosure of information on costs and charges and Stocks and Shares Junior ISA – Terms and Conditions.

Please read these documents carefully as they contain all the information you need to be aware of before topping up your Stocks and Shares Junior ISA. If there is anything that you do not understand please ask for further information. If you do not have any of the above documents, please contact any branch to obtain those you are missing. Please mark this box with a cross to confirm you have all the above documents. ☐

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1. Your Personal Details – Registered Contact

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐ ________ (please specify)

First name(s)

Surname

Address line 1

Address line 2

Address line 3

Address line 4 OR overseas address

Postcode

Telephone number (Daytime)

Telephone number (Evening)

2. Child's Personal Details

First name(s)

Surname

Address line 1
(If different from
Registered Contact details)

Address line 2

Address line 3

Address line 4 OR overseas address

Postcode

Date of Birth (DD/MM/YYYY)

Existing plan/account number

3. Payments

To make a single (one-off) payment
The minimum additional payment you can make is **£1**.

I wish to make a single payment of £ . **p**

Please make your cheque payable to: **RBS Collective Investment Funds Limited** and write your plan/account number on the back.

Please sign the form below and return it to us. If you are making payment by cheque, please remember to include this.

OR to increase your monthly payment

You can increase your monthly payments by a minimum of **£1**.

Please increase my monthly payments by £ . **p**

Making a new **total** monthly payment of £ . **p**

Please sign the form in the box below and return it to us.

If you want to start monthly payments to an existing single contribution plan please call us on 0345 604 4500.

4. How we will use and share your information

(a) Credit reference and fraud prevention agencies

We may request information about you from credit reference agencies to help verify your identity to comply with laws that apply to us. This request will not affect your ability to obtain credit (for example for a loan or credit card) in the future.

Application decisions may be taken based on solely automated checks of information from credit reference agencies and internal RBS records. You have rights in relation to automated decision making. If you want to know more please see our full privacy notice at www.rbs.co.uk/privacy or contact as at 03457 24 24 24, +44 131 549 8888 (for overseas) or 0800 404 6160 (for minicom users).

In order to prevent and detect fraud and/or money laundering, the information provided in this application may be checked with fraud prevention agencies. If fraud is identified or suspected, details may be recorded with these agencies to prevent fraud and money laundering.

If we, or a fraud prevention agency, determine that you pose a fraud or money laundering risk, you could be refused services, finance or employment.

When credit reference and fraud prevention agencies process your information, they do so on the basis that they have a legitimate interest in preventing fraud and money laundering, to verify your identity, to protect their business and to comply with laws that apply to them.

(b) With other RBS companies

We and other RBS companies worldwide will use the information you supply in this application (and any information we or other RBS companies may already hold about you) in connection with processing your application and assess your suitability for our products.

If your application is declined we will normally keep your information for up to 5 years, but we may keep it for longer if required by us or other RBS companies in order to comply with legal and regulatory requirements.

We and other RBS companies may use your information in order to improve the relevance of our products and marketing.

(c) With other Third Parties

The information provided in this application may be used for compliance with legal and regulatory screening requirements, including confirming your eligibility to hold a UK bank account and sanctions screening.

We may be required to disclose certain information to regulators, government bodies and similar organisations around the world, including the name, address, tax number, account number(s), total gross amount of interest paid or credited to the account and the balance or value of the account(s) of our customers to HM Revenue and Customs ('**HMRC**'). HMRC may exchange this information with other countries' tax authorities. ☐

5. Confirming Your Agreement

By continuing with this application, you confirm that you have read and understood how we may use your information in the ways described above and are happy to proceed.

6. Marketing Information

RBS would like to keep you informed by letter, phone, email and text message about products, services and offers that we believe may be of interest to you. If you do not wish us to contact you for these purposes, please place a cross in the box.

RBS will not share your information with third parties for their own marketing purposes.

7. Communications about your Account

Notwithstanding your marketing choices above, we will contact you with information relevant to the operation and maintenance of your account by a variety of means including online banking, mobile banking, email, text message, post and/or telephone.

8. Signature

Signature

Name

Date of signing (DD/MM/YYYY)

IMPORTANT INFORMATION

Please return your completed form to: **RBS JISA, PO Box 915, Newport NP20 9PF.**
If you are making payment by cheque, **please remember to include this.**