

3. Top-up details – continued

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).

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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

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 and the key investor information document(s) 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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