

## Change of Registered Contact

# BMO Junior ISA (JISA)

Please use this form if you would like to:

- Change the Registered Contact for a JISA to another person.

To become the Registered Contact, you must have parental responsibility for the child; you may be the child's natural parent, have legally adopted the child, or have been granted legal authority by the courts. The child can also become the RC at age 16 and take over the running of their JISA.

Please email our Investor Services Team at [investor.enquiries@bmogam.com](mailto:investor.enquiries@bmogam.com) or call 0345 600 3030 if you have any queries.

**Please complete this form in block capitals and black ink.**

**Please return the form to:**

**BMO Asset Management Limited  
PO Box 11114  
Chelmsford  
CM99 2DG**

21DLU/1  
06/21

### Part 1 Child's details

Master  Miss  Child's first name(s) in full  Child's surname

Child's home address (including postcode)

Postcode

Country

Account number  Date of birth  Nationality

National Insurance number\*

\*If child is over 16 years old

### Part 2 Personal details (current Registered Contact)

**Please ensure you supply all information requested below. Without the full information your account may be restricted - all fields marked with an \* are required.**

Title (Mr/Mrs/Miss/Ms/Other)\*  First name(s) in full\*  Surname\*

Permanent residential address (including postcode)\*  
  
 Postcode Country

Nationality\*  Date of birth\*  National Insurance number\*

Telephone  Email address

I wish to relinquish my position as Registered Contact for the above child and pass the responsibility to the new Registered Contact as detailed below.

Signature

Date

### Part 3 Personal details (new Registered Contact)

Please ensure you supply all information requested below. Without the full information your account may be restricted - all fields marked with an \* are required.

Title (Mr/Mrs/Miss/Ms/Other)\* First name(s) in full\* Surname\*

Permanent residential address (including postcode)\*

  

Country

Nationality\*

Date of birth\*

National Insurance number\*

Telephone

Email address

Relationship to child

Providing your telephone number will help us contact you quickly if there are any queries with this form.

#### Data Protection

All personal information submitted with this application form will be treated in accordance with BMO Asset Management Limited's Privacy Policy, which is available at: [bmoinvestments.co.uk/privacy-policy](https://bmoinvestments.co.uk/privacy-policy). This privacy policy includes full details about the type of information we collect, what we use this information for, and your related rights.

In addition, the Key Features and Terms & Conditions document for the selected account contains a summary of the key information about how we process your personal information. Should you have any questions regarding how we process your personal information key contact information can be found both in the Privacy Policy and the Terms & Conditions document.

#### Marketing

We would like to provide you with details of financial services and products that we offer which we think you might find interesting. **If you would NOT like to receive such information, please tick this box** . If at any time you change your mind, please let us know by emailing us at [preferences@bmogam.com](mailto:preferences@bmogam.com).

### Part 4 Declaration and signature

I declare that:

- I understand and accept that this change in Registered Contact is made on the basis of and subject to the current BMO Junior ISA Terms & Conditions.
- I am 16 years of age or over.
- I have full parental responsibility for the child indicated in Part 1.
- I agree to be the Registered Contact for the BMO Junior ISA.
- I confirm I have read the Key Features of the BMO Junior ISA.
- I confirm that I have read the latest Key Information Documents (KID) for the selected investment trust(s).
- I authorise BMO Asset Management Limited to hold the child's HM Revenue & Customs contributions, subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and to make on the child's behalf any claims to relief from tax in respect of JISA investments.
- All existing Direct Debit arrangements will remain unless you are notified otherwise.
- The information given in this application is correct.

To be signed by person named in Part 3

Date



**BMO Asset Management Limited**

0345 600 3030, 9am - 5pm, weekdays, calls may be recorded or monitored for training and quality purposes.

BMO Asset Management Limited is authorised and regulated by the Financial Conduct Authority and is a member of BMO Global Asset Management EMEA of which the ultimate parent company is the Bank of Montreal. L23\_06/21