



Your Jump Savings application form

# Jump

**Mandatory fields marked with\***

To open a Jump Savings Account please complete and sign this application form and post it to the address at the end of this form. Please read this form in conjunction with the Jump Terms and Conditions. If you already have a Jump account, please advise us of your account number at the end of Section 1.

1. Your personal details – please use CAPITALS

Your title\* Mr  Mrs  Miss  Ms  Other title

Your last name\*

Your first name\*

Email address

Mother's maiden name\*

(This is required for security purposes)

Your date of birth\*          
D D M M Y Y Y Y

Nationality

(If not UK, please write here)

Your permanent home address\* House No.  Post code

Address details

Please enter in the box below the full name of the child on whose behalf you are investing in Jump

If you have moved house in the last 18 months please mark a cross in this box

House No.  Post code

Daytime telephone number\* (please include extension number if appropriate)

Do you have a National Insurance number?\*

Yes  No  You can find your National Insurance number on a payslip, form P45 or P60, letter from HMRC or DWP, or a pension book. If you do not have a National Insurance number please call Customer Services on 0800 011 2015.

If Yes you must write it here

This will be 9 characters: 2 letters, 6 numbers followed by the letter A, B, C or D.

Place of birth

If you are an existing Jump customer please enter your account number below:

XXXXXX





## 2. Joint applicant details (if applicable)

### Second applicant

Your title Mr  Mrs  Miss  Ms  Other title

Your last name

Your first name

Email address

Nationality

(If not UK, please write here)

Your date of birth          
D D M M Y Y Y Y

Your permanent home address House number     Post code

Address details

## 3. Banking details – This must be completed\*

Please nominate a UK bank account from which to make and receive payments to and from your Jump account. You must complete the Direct Debit mandate in order for us to open your account.

The Direct Debit mandate does not oblige you to make regular payments to your Jump account. It gives you the flexibility to make payments at any time to and from your Jump account. Funds will take at least three working days to clear.

Trades will be executed only if there are sufficient funds available to pay for them in your Jump account.

Do you want to make regular payments from your bank account to your Jump account? Yes

Your bank account will be debited on the 15th day of the month or the next working day thereafter.

Please enter the amount you wish to transfer each month/quarter £

### The name(s) on your account

### Branch sort code

-  -

### Bank/Building Society account number

### Originators identification number

8 3 8 3 5 4

### Instruction to your Bank or Building Society

Please pay Witan Investment Services Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee.

I understand that this instruction may remain with Witan Investment Services and, if so, details will be passed electronically to my Bank/Building Society.

### Signature\*

### Date\*



XXXXXX

### Name and full postal address of your Bank or Building Society

To: The Manager Bank/Building Society

Address

Post code

Please read this guarantee before you sign. A copy of it is available from our website or on request from Customer Services.

#### The Direct Debit Guarantee

This Guarantee is offered by all Banks and Building Societies that accept instructions to pay Direct Debits. If there are any changes to the amount, date or frequency of your Direct Debit, Witan Investment Services will notify you 14 working days in advance of your account being debited or as otherwise agreed. If you request Witan Investment Services to collect a payment, confirmation of the amount and date will be given to you at the time of the request. If an error is made in the payment of your Direct Debit by Witan Investment Services or your Bank or Building Society, you are entitled to a full and immediate refund of the amount paid from your Bank or Building society. If you receive a refund you are not entitled to, you must pay it back when Witan Investment Services asks you to. You can cancel a Direct Debit at any time by simply contacting your Bank or Building society. Written confirmation may be required. Please also notify us.



#### 4. Your instructions\*

Stock Code

W T A N

Stock name in full\*

W I T A N I N V E S T M E N T

Value £

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Lump sum (minimum £100)

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Regular sum (minimum £25)

Please include a cheque for this amount

Please complete the Direct Debit form in Section 3. Advise whether payments required Quarterly  or Monthly

I would like dividends to be:

Reinvested  or Paid Out  (to my bank account)

#### Lump sum investment by cheque:

If you wish to fund your lump sum investment by cheque, please enclose a cheque made payable to Jump Client a/c, your name.

XXXXXX

#### 5. Bare Trust

If you are considering placing your Jump Plan in a Bare Trust you will have to complete a declaration of trust (as mentioned on page 7 of the Brochure).

If you would like to request a Jump Bare Trust pack, please mark a cross in the box.

#### 6. IFA (Independent Financial Adviser) Use Only

IFA code

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Initial Commission

% commission

[ ] [ ] [ ] [ ] [ ] [ ]

(up to a maximum of 3%)

#### 7. Declarations\*

##### I/we declare that

I am/we are over 18 years of age and wish to open a Jump Savings Account as indicated in this Application Form.

I/we agree to be bound by the Jump Terms and Conditions which form part of this Application Form.

I/we have retained a copy of the Terms & Conditions for my/our own records.

I/we permit Witan Investment Services to submit the data provided by me/us in this application to Experian or any other third party used by Witan Investment Services for the purposes of database searching to verify my/our identity and prevent fraud. A record of the search will be retained.

Signature\*

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Date\*

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Joint Applicant (if any)

Signature

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Date

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

I/we agree Witan Investment Services may also contact me/us about other services and products which may be of interest to me/us. (If you do not want to be contacted, you can write to us at any time).

I/we do not want to be contacted

(please mark a cross in the box)

Please complete Section 8 overleaf.





## 8. Checklist

Please use this checklist to ensure you have completed the Jump application form in full and enclosed all supporting documents.



### Personal details

Ensure that you have completed all your personal details including address, post code, date of birth and National Insurance number.



### Cash transfer

Please ensure that you have enclosed a cheque for lump sum purchases and/or the Direct Debit for regular contributions.



### Declarations

This section must be read and signed.

XXXXXX

**If you have been at your current address for less than 18 months, or are not a UK based citizen, please include the following documents with your application:**



### Utility bills/bank statement

Two recent original utility bills (both less than three months old) or a recent original utility bill and bank statement (both less than three months old).



### Banking details

Ensure that you have supplied your bank details and enclosed a copy of your bank statement.

All original documents will be returned to you once your application has been processed.

## What will happen now?

Once your application has been processed, you will receive the following from Jump:

- Your individual Jump savings account number.
- Contract Note detailing your transactions for a lump sum investment.

If you have requested a Bare Trust pack one will be sent to you within 7 working days. If the pack hasn't been received within 7 working days, please telephone us on 0800 011 2015.

**Please return this form in the enclosed reply paid envelope. Alternatively you can post this form to** (this will require a stamp):

Jump Savings, PO Box 4605, The Causeway, Worthing, West Sussex BN99 6QY

