

## Change of registered contact

– *Junior ISA (JISA)*

### With this form you can:

- ☒ request a change to the registered contact on a JISA.

**We regularly update our forms;** your financial adviser can confirm that this **February 2026** version is the latest by checking on our website [quilter.com](https://www.quilter.com)



### *How to complete your form*

- **Option 1 (electronic):** Save the form to your desktop, open it in **Adobe Acrobat** to complete the editable fields, then either print and sign it, or sign it digitally.
- **Option 2 (by hand):** Print the form and complete it in BLOCK CAPITALS using blue or black ink.
- **Date Format:** please use **DD/MM/YYYY**.
- Missing or unclear information can result in delays.



### *Additional documents or information we might need*

- **Proof of your identity** – if not already provided (see section 5).
- **Documents outlined in section 3.1** – if applicable, but not already provided.



### *How to send us your form*

Send your scanned form\* to us via PROMPT, our tool for uploading documents direct to us.

Advisers visit: [quilter.com/Adviser-Prompt](https://www.quilter.com/Adviser-Prompt)

Customers visit: [quilter.com/Customer-Prompt](https://www.quilter.com/Customer-Prompt)



OR

Send your scanned form\* securely by email to:

[ask@quilter.com](mailto:ask@quilter.com)



Alternatively, you can send your form by post to: Quilter, SUNDERLAND, SR43 4JP.

\*Before sending any supporting documents to us, please refer to our guide about which documents must be certified as true copies and who can certify them. The guide is available via your PROMPT link above.



## 1. JISA details

### 1.1 JISA account number

Customer Reference										Account			
A	C									–			

### 1.2 Child's details

Full name

Date of birth

## 2. Registered contact details

### 2.1 Current registered contact

First name(s)

Surname

Date of birth

### 2.2 New registered contact

The new registered contact must have parental responsibility for the child named in section 1.2.

Title

Mr

Mrs

Miss

Ms

Other ► (Please specify)

First name(s)

Surname

Date of birth

Telephone number

Email

National Insurance (NI) number

**OR** If you are not eligible to have an NI number, tick here

Permanent UK residential address

Postcode									

► We cannot accept addresses that are 'care of', contain a PO Box number, or belong to your financial adviser.

Use the residential address for correspondence?

Yes

No - enter the correspondence address below

Correspondence address

Postcode									

► We cannot accept a correspondence address that belongs to your financial adviser.

### Tax Residency and nationality

**Do you hold tax residency status anywhere other than the UK?** ► Please tick one, as applicable

No, in the UK only

I hold dual tax residency and **AM** a Crown employee or their spouse

I hold dual tax residency and am **NOT** a Crown employee nor their spouse

Please complete **Supplement A**

**What is your country of nationality?** ► Please tick one, as applicable

I am a UK national only

I have either dual nationality or a non-UK nationality

Please complete **Supplement A**

### 3. Consent of the current registered contact

#### 3.1. The consent of the current registered contact is not required in the following circumstances.

Please tick as applicable and include the required supporting documents with this form.

**The current registered contact has died or become incapacitated.**

Please send an original or certified copy\* of a letter from a medical practitioner as evidence of incapacity, or an original copy of the Death Certificate.

**The child has been adopted by the new registered contact.**

Please send a certified copy\* of the adoption papers.

**A Court Order has ended the current registered contact's parental responsibility for the child.**

Please send a certified copy\* of the Court Order.

**A Court Order confirms that the current registered contact should cease to be so.**

Please send a certified copy\* of the Court Order.

**The existing registered contact cannot be contacted.**

We will let you know if our records suggest that we still have contact with the current registered contact.

**A court has appointed a Guardian or a Special Guardian of the child.**

Please send a certified copy\* of the Court Order.

\* Copies of documents must be certified as outlined in section 6.2.

**If none of these circumstances applies, the current registered contact must sign in section 3.2.**

#### 3.2. The current registered contact's consent

- a) I am the current registered contact for the JISA detailed in section 1.
- b) I give my consent for the person named in section 2.2 to become the new registered contact on this JISA.
- c) I understand that:
  - I will no longer be named on the JISA as a registered contact or receive any correspondence in respect of the JISA
  - all management for the JISA will pass to the new registered contact.

Signature

Date

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### 4. Declaration of the new registered contact

- 1. a) I apply to be the new registered contact for the JISA detailed in section 1 of this form.
- b) I declare that:
  - I am 18 years of age or over;
  - I am resident in the UK;
  - I have parental responsibility for the child named in section 1.2.
- c) I understand that the child named in section 1.2 is the beneficial owner of the investments held within the JISA.
- 2. I authorise Quilter Investment Platform Limited ('Quilter')
  - a) to hold the subscriptions, JISA investments, interest distributions, dividends and any other rights or proceeds in respect of those investments and any other cash; and
  - b) to make on the child's behalf any claims to relief from tax in respect of JISA investments; and
  - c) to sell units or shares in investments within the JISA to meet any charges in accordance with the Terms and Conditions; and
  - d) to give effect to my instructions in accordance with the Terms and Conditions.
- 3. **Privacy information** – I confirm that I have read Quilter's privacy notice available at [quilter.com/privacy](https://quilter.com/privacy) concerning use of my personal information.
- 4. I declare that this form has been completed correctly and to the best of my knowledge and belief.

Signature

Date

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## 5. Money laundering regulations: proof of identity

We need proof of your identity to meet our requirements under UK money laundering regulations (unless already provided for one of our platform products).

This can be provided by the financial adviser in **Part A**, alternatively complete **Part B**.

### Part A - Financial adviser's Confirmation of Verification of Identity (CoVI)

I confirm that:

- a) I have verified the identity of all relevant parties referred to in this form
  - b) the information in this form was obtained by me in respect of the relevant parties
  - c) the evidence I have obtained to verify the identity of the relevant parties can be produced on demand and meets the standard of evidence set out within the guidance for the UK Financial Sector issued by the Joint Money Laundering Steering Group (JMLSG)
  - d) if any individual referred to in this application has changed address within the last three months, I can provide evidence on demand
  - e) I have not verified the identity of the following parties referred to in this form because they are exempt from verification under Money Laundering Regulations
- f) this section is signed below by the person who has seen the documentary evidence (which may include an electronic identity check).

Financial adviser's  
signature

Date

Print name

Position

Email address

Telephone number

Full name of regulated firm  
(or sole trader)

Financial Services  
number



**This section cannot be used to verify the identity of anyone who falls into one of the following categories:**

- those who are exempt from verification as being an existing client of the introducing firm prior to the introduction of the requirement for such verification,
- those who have been subject to Simplified Due Diligence under the Money Laundering Regulations, or
- those whose identity has been verified using the source of funds as evidence.

Evidence of identity must be provided to us for any such cases.

### Part B - Proof of identity.

**To be completed if the financial adviser has not completed Part A.**

Please provide a copy\* of your **current valid passport or photo driving licence** (unless already provided for one of our platform products).



**\*The copy must be certified as a true copy** by a financial adviser, bank or building society official, barrister, solicitor, doctor, or accountant. The person certifying the copy must write on it 'Certified as a true copy of an original seen by (print their name and title)' then they must sign and date the copy (with a company stamp where applicable).

You can scan and send certified documents to us by email - see page 1 for details.

Tick the following as applicable:

- ☐ Certified copy of passport is enclosed with this form.
- ☐ Certified copy of driving licence is enclosed with this form.
- ☐ Proof of identity previously provided to Quilter.



[quilter.com](https://quilter.com)

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years. Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

Registered Office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB, United Kingdom. Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority. Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Their Financial Services register numbers are 165359 and 207977 respectively. VAT number 386 1301 59.

## Supplement A

# Tax residency & nationality details

You only need to complete and return this page if:

- you hold tax residency outside of the UK (*including where you have dual tax residency status, as well as the UK*)
- your country of nationality is something other than the UK (*including where you have dual nationality*)

**Your full name**

### PART 1. Tax Residency



- Normally you are considered a tax resident in a country if you pay tax there. This could mean you are tax resident in multiple countries if you pay tax in multiple countries. However, some countries may consider you a tax resident based on your nationality (eg the United States).
- Your **Tax Identification Number (TIN)** type is the number used to identify you for tax purposes. For example, in the UK the 'type of TIN' is your National Insurance number. For guidance on TINs for other countries see:

[www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers](http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers)

**Please tell us where you are tax resident outside of the UK**

**Country of tax residence 1**

TIN

Type of TIN

**Country of tax residence 2**

TIN

Type of TIN

### PART 2. Nationality

**Please tell us which nationality you hold other than UK**

**Country of nationality 1**

Passport number

Passport expiry date

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**Country of nationality 2**

Passport number

Passport expiry date

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