

Serious ill-health withdrawal request

– Junior ISA (JISA)

With this form you can:

- request the withdrawal of JISA savings due to the child's serious ill-health.

It can only be used if:

- HMRC has already confirmed in writing* that the JISA savings can be withdrawn.

* The Registered Contact of a child who is terminally ill will need to make a claim to HMRC to be allowed to access the assets in the child's JISA. If the claim is agreed, HMRC will issue a letter to the Registered Contact letting them know that the JISA savings can be withdrawn.

NOTE: There are no early redemption charges for withdrawing the JISA savings.



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.
- References in this form to Quilter mean Quilter Investment Platform Limited.



Additional documents or information we will need

- **HMRC letter (or a certified copy*)** – confirming that the JISA savings can be withdrawn.
- **Proof of bank account ownership** – If we have not already seen it. The proof can be an original or a certified* copy of a voided cheque or bank account statement dated within the last six months. If you have online bank account statements, a printed copy certified* by your adviser as a true copy will suffice.

*Copies of documents must be certified on each page in ink by a professional such as your financial adviser, solicitor, accountant, GP or bank manager (including the bank's stamp). We can accept scanned certified copies.



How to send us your form

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

Customers visit: quilter.com/Customer-Prompt
Advisers visit: quilter.com/Adviser-Prompt



OR

Send your scanned form* securely by email to:

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.



Timescales

- Once we receive this form and all documents required, we aim to send you your withdrawal payment within 10 working days.



