

Children's ISA Application Form



Update to May 2026

Please check the details below carefully and advise us of any amendments within the next 30 days.

Part A Applicant details (and registered contact for the Children's ISA)

NB. The Applicant must be a person with parental responsibility for the child (unless the Applicant is 16-18 years old).

Your title	<input type="text" value="Mr/Mrs/Miss/Ms/Other"/>	Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female
First name	<input type="text"/>	Second name	<input type="text"/>	
Surname	<input type="text"/>			
National Insurance no.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of Birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Nationality	<input type="text"/>			
Your permanent UK residential address	<input type="text"/> <input type="text"/> <input type="text"/>			
		Postcode	<input type="text"/>	
Daytime telephone no:	<input type="text"/>			
Evening telephone no: (if different)	<input type="text"/>			
E-mail address (Compulsory)	<input type="text"/>			
I apply to open a Children's ISA for:				
Child's title (if any)	<input type="checkbox"/> Mr	<input type="checkbox"/> Miss	<input type="checkbox"/> Mrs	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
First name	<input type="text"/>	Second name	<input type="text"/>	
Surname	<input type="text"/>			
Child's address	<input type="text"/> <input type="text"/> <input type="text"/>			
		Postcode	<input type="text"/>	
Child's date of birth	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Must be under 18 when applying.
Child's National Insurance (NI) number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
OR The Child stated above does not have an NI number	<input type="checkbox"/>	It is an HMRC requirement that you supply the child's date of birth and National Insurance number, if they have one.		

It is important to note that the Child stated above will be the beneficial owner of the investments held in the Children's ISA.

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Part B Subscription details

I apply to subscribe for a Children's ISA for the tax year ending and, where applicable, each subsequent year as detailed below.

5 April 20

How much do you want to invest?

The minimum total lump sum/transfer investment is £10 and the minimum monthly payment is £10.

Lump sum £
(Max £9,000 pa)

Monthly £
(Max £750 pm)

Transfer £ approx

You will also need to complete a separate Transfer Authority Form.

Part C Investment details

Please give details below of how you would like your Children's ISA invested.

(Minimum investment is £10 per fund).

	Investment Approach	Full name of individual fund/investment trust	% of lump sum investment	% of monthly investment
1	Defensive	CISA Conservative Fund	<input type="text"/>	<input type="text"/>
2	Balanced	CISA Growth Fund	<input type="text"/>	<input type="text"/>
3	Adventurous	CISA Adventurous Fund	<input type="text"/>	<input type="text"/>
4	Compliant	HSBC Global Islamic Equity Index Tracker	<input type="text"/>	<input type="text"/>
Must equal			100%	100%

CHILD TRUST FUND TO JUNIOR ISA TRANSFER REQUEST FORM

*This transfer application **must** be completed by the registered contact for the CTF account.*

The following stakeholder CTF features may not be included in a Junior ISA:

- Lifestyling from age 15
- Minimum subscriptions of £10 allowed
- Annual charge cap of 1.5%

If you are applying to transfer a stakeholder CTF, tick this box to confirm that you understand this and wish to proceed.

If the transfer from the CTF is not successful, any JISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional JISA will be returned. The CTF will remain intact.

Applicant's title (if any)	<input type="text"/>
Full name	<input type="text"/>
Applicant's address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	Postcode: <input type="text"/>

I apply to transfer a CTF for:

Child's title (if any)	<input type="text"/>
Child's full name	<input type="text"/>
Child's address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	Postcode: <input type="text"/>
Child's date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Child's Unique CTF Reference Number - (format AB123456C)	<input type="text"/>
CTF provider	<input type="text"/>
CTF provider's address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	Postcode: <input type="text"/>

I declare that I am the registered contact for the CTF.

I authorise Quai Investment Services Limited:

- to hold the child's subscriptions, investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- to make on behalf of the child any claims to relief from tax in respect of JISA investments.

Signature:	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
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Please note the following important information:

Quai Investment Services Limited does not give advice on the selection of investments and strongly recommends that you consult the Children's ISA Limited if you require assistance with investment decisions.

unit prices can go down as well as up. You may not get back the full amount invested when the account is closed. Any tax reliefs referred to are those that currently apply and their value depends on your individual circumstances.

Full details of the Children's ISA can be found in the Key Features document.

If paying regular monthly contributions please bear in mind that if contributions are not maintained, you will be less likely to achieve the investment amount that was originally projected.

Part E Checklist

Have you?....

- read the Children's ISA Key Features, Key Investor Information Documents and Terms and Conditions?
- checked the Application Form thoroughly and completed all relevant sections.
- completed the separate Transfer Authority Form if transferring another Junior ISA into your Children's ISA?
- included your child's National Insurance number if they have one? If they do not have a National Insurance number then please tick the box to say that they do not have one.

Part F What to do now

- Thank you very much for taking the time to apply for a Children's ISA.
- If you are making regular monthly payments, remember to detach and keep the direct debit guarantee.
- Keep the remaining literature safe for future reference.

The Children's ISA limited is authorised and regulated by the FCA (FCA No: 563043) The Children's ISA Limited is a company registered in England and Wales. Registered Office: Suite 6, Moorfield House, Moorside Road, Swinton M27 0EW.
Registered Company No: 07486015

The Children's ISA is provided by Quai Investment Services Limited
Quai Investment Services Limited a company incorporated in England and Wales (company number 9919243).
Quai Investment Services Limited is authorised by the Financial Conduct Authority (register number 922590).
Registered Office: 16 Tesla Court, Innovation Way, Peterborough, PE2 6FL.