

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"/> <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%

The Children's ISA Transfer Authority Form



Please complete a transfer authority for each Cash or Stocks & Shares Junior ISA you wish to transfer to The Children's ISA. We will contact you if for any reason the plan manager cannot make the transfer. This form should be completed along with the appropriate Children's ISA Application Form.

Transfer Instruction

Please transfer my (Cash / Stocks & Shares*) Junior ISA.

* please delete one as applicable.

Approximate value of transfer: £

Current Junior ISA plan manager:

Account number:

Child's Name:

Child's date of birth

Current provider's address:

Postcode:

I hereby instruct my current Junior ISA plan manager named above to arrange the transfer of my Junior ISA with immediate effect to the new Junior ISA Plan Manager, Quai Investment Services Ltd, 16 Tesla Court, Innovation Way, Peterborough, PE2 6FL.

Registered Contact:
Mr/Mrs/Miss/Ms/Other:

Forenames:

Surname:

Registered Holder's address:

Postcode:

Signature:

Date:

To the Junior ISA plan manager:

Please make cheques payable to **QISL Childs ISA CMA** and send the full Junior ISA history as soon as possible.

Quai Investment Services Limited, a company incorporated in England. Quai Investment Services Limited is authorised and regulated by the Financial Conduct Authority (register number 922590).

Registered office: 16 Tesla Court, Innovation Way, Peterborough, PE2 6FL

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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).
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