



## Serious ill-health withdrawal request

– Junior ISA (JISA)

### Using the editable fields?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

### With this form you can:

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

### This form 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- HMRC has already confirmed in writing\* that the JISA savings can be withdrawn.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the claim is agreed, HMRC will issue a letter to the Registered Contact letting them know that the JISA savings can be withdrawn.*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.

### Completing this form

- Complete this form using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- 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- **HMRC letter (or a certified copy\*)** – confirming that the JISA savings can be withdrawn.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.*

### Giving us your instruction

- **By post to** – Quilter, SUNDERLAND, SR43 4JP.
- **By email** – send a scanned copy of the form and HMRC letter to [ask@quilter.com](mailto:ask@quilter.com)

### Timescales

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

## 1. The child's details

Account number

JISA	-	A	C																
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First name(s)

Surname

Date of birth

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Permanent UK residential address

											Postcode

## 2. The registered contact's details

Full name	<input type="text"/>	
Telephone number	Email address	
Residential address	<input type="text"/>	
	Postcode	

## 3. Bank details

Please state the bank account into which the JISA withdrawal proceeds should be paid. This must be a UK bank account in the name of the Registered Contact or with them as a joint holder; we CANNOT make withdrawal payments to other parties.

Branch sort code	<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"/>	Bank/Building Society account 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"/>
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UK Bank/Building Society name

Name of bank account holder(s)

Reference ▶ *Optional*

*Any reference here will appear on your bank statements. For a Building Society account, enter the roll number.*

Type of bank account                      Individual                      Joint

## 4. Your declaration

- a) As the child's Registered Contact, I request the withdrawal and closure of the JISA detailed in section 1.
- b) I accept that the instructions in this form will be carried out under the Terms and Conditions of the JISA.
- c) I understand that payments made by Quilter in accordance with the request in this form shall constitute a full discharge from all liabilities and claims arising thereunder.

Signature	<input type="text"/>	Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<i>Registered Contact</i>		



[quilter.com](http://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.*