

Family linking application form

This form lets you appoint an Account Lead and link them to your child's Junior SIPP account. You can choose to either give the Account Lead 'view only' access, meaning they can see your child's investments but not buy or sell them. Or 'Dealing' access, meaning they can see your child's investments and buy and sell them too.

If you wish to appoint an Account Lead to another type of account you can do so by logging into your account www.ajbell.co.uk selecting 'Update my details' and then choose 'Family linking'.

Please complete your details below including your AJ Bell account number and the details of the person who you are providing Account Lead access to. Both of you should sign this form.

Some things to keep in mind:

- The Account Lead you appoint can only be a family member and can't be a financial adviser acting in a professional capacity on your behalf.
- The Account Lead won't have authority to make changes to your personal details.
- Certain accounts can't act as the Account Lead. You can find more information on which accounts can't be linked on the Family linking webpage.

If you'd like a copy of this or any other item of our literature in large print, Braille or audio format, please contact us on 0345 54 32 600, or by email at help@ajbell.co.uk.

Child's personal details

Title

Surname

Forenames

Date of birth

Registered contact details

Full name

AJ Bell Junior SIPP account number

Relationship to Account Lead

I wish to grant the Family member named below (please choose one option only):

☐

'View only' access to the AJ Bell Junior SIPP account

☐

'Dealing' access to the AJ Bell Junior SIPP account

Family member details

Full name

Permanent residential address

Postcode

Country

AJ Bell account number

Registered contact declarations

By signing below, you:

- authorise AJ Bell Management Limited, Sippdeal Trustees Limited and AJ Bell Securities Limited (together 'AJB Companies') to disclose information about the account to the Account Lead
- acknowledge that the Account Lead will be granted either 'view only' or 'dealing' access to the account. Dealing access will enable the Account Lead to buy and sell investments, create and respond to secure messages and make elections for Corporate Action options
- acknowledge that you must notify AJ Bell in writing if you intend to cancel this authority and that the Account Lead's permissions shall remain in place for the account until AJ Bell confirms by secure message that your instructions have been actioned
- agree to indemnify the AJB Companies from and against all claims, demands, liabilities, costs, losses and expenses (including legal costs) suffered or incurred arising directly or indirectly as a result of any act or omission on the part of the Account Lead in relation to the AJ Bell account
- confirm that the Account Lead is not acting as your financial adviser for the AJ Bell account
- understand the Account Lead will not be able to change your personal details, password or instruct withdrawals to be made from the AJ Bell account.

Your signature

Date

Family member - declarations

I consent to act as Account Lead for the account of the customer named in this form.

I agree to act in accordance with the relevant account terms and conditions.

I agree to indemnify AJ Bell Management Limited, Sippdeal Trustees Limited and AJ Bell Securities Limited (together 'AJB Companies') from and against all claims, demands, liabilities, costs, losses and expenses (including legal costs) suffered or incurred arising directly or indirectly as a result of any act or omission on my part in relation to the account of the customer listed above.

Your signature

Date

Next steps

When the form is signed and completed, please email a scanned PDF copy to administration@ajbell.co.uk

Or if you prefer, you can post the completed form to us at:

AJ Bell Customer Services Team
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

We'll aim to process your completed application form 5 working days after we receive it. If we need any more information to process the application, we'll be in contact during this time.

Once your account has been linked, we'll email you and the Account Lead to let you know. If you have any questions in the meantime, please contact us at administration@ajbell.co.uk.