

Family linking application form



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

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.
- Junior ISAs and Cash savings hub accounts can't be included in family linking.
- 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.

My details

Full name

Account number

Relationship to Account Lead

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

'View only' access to my AJ Bell account(s)

'Dealing' access to my AJ Bell account(s)

Family member details

Full name

Permanent residential address

Postcode

Country

AJ Bell account number

My 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 your account to the Account Lead
- acknowledge that the Account Lead will be granted either 'view only' or 'dealing' access to your accounts. 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 your authority shall apply to all AJ Bell accounts that you hold, unless otherwise instructed by you
- 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 your account(s) 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 your AJ Bell account(s)
- confirm that the Account Lead is not acting as your financial adviser for your AJ Bell accounts
- understand the Account Lead will not be able to change your personal details, password or instruct withdrawals to be made from your AJ Bell account(s).

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(s) of the customer(s) listed below.

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.