

CREATING A REGISTERED CONTACT CUSTOMER RECORD



Junior ISA (JISA) Portfolio

With this form you can create a 'shell account'* for the registered contact who will be linked to the JISA Portfolio. This form is only to be used if the registered contact doesn't already have a platform product.

*A shell account is a customer record that's created to link a registered contact to a Junior ISA when they don't have an Aviva adviser platform product.

Completing this form

- Missing or unclear information can result in delays in setting up the account.
- The registered contact must be a person with parental responsibility for the child named on the JISA you wish to link this account to.
- Once completed please email to **platformJISAregisteredcontact@aviva.com** and we'll create the registered contacts account on your behalf.

Section 1: Registered contact's details

Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other (Please specify) <input type="text"/>
First name(s)	<input type="text"/>
Surname	<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"/> <input type="text"/> <input type="text"/>
Country of birth	<input type="text"/>
Telephone number	<input type="text"/>
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"/>
Permanent UK residential address	<input type="text"/>
	<input type="text"/> Postcode

We can't accept a residential address that is 'care of' which contains a PO Box number or which is your regulated firm's address.

Tax residency

Are you UK tax resident?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you a UK national?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes to both above, are you sole resident and nationality of the UK only?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If yes to all of the above, please move to section 2. If no to any of the above, please complete the tax residence and nationality sections below.

Please complete this section if you hold nationality or tax residence status anywhere other than the UK.

Normally you are resident for taxation in the country in which you spend the majority of your time each year. However, some countries (e.g. the United States) may also treat an individual as resident for taxation based on their nationality or citizenship. As tax residence is determined by the country in which tax is paid, it's possible to be tax resident in more than one country.

Do you hold dual nationality?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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If yes, please complete the 'Dual nationality' section. If no, please complete the 'Non-UK or Multiple tax residencies' section.

Section 1: Registered contact's details continued

Please note

Tax identification type/number

- If your country of tax residence is the UK or the Isle of Man, your 'tax identification type' is your National Insurance number.
- For Guernsey, Jersey or Gibraltar it's your Social Security Number.
- If you are a US national/tax resident, it's your US Tax Identification Number.
- For many European countries it's your National ID number.
- For Greece and Portugal it's the Tax Identification Number.
- For Italy it's the Fiscal Code.

If the tax identification has an expiry date, this will also be needed.

If you are tax resident in more than one country, you may need to determine your treaty residence position in order to identify which country has precedence. The country in which you are treaty resident is your 'first country of residence'.

For help to work out where you are resident, or if you're unsure about you tax identification type/number, please consult your financial adviser.

There is some helpful guidance here litrg.org.uk/tax-guides/migrants/residence-and-domicile/what-dual-residence

Non-UK or Multiple tax residencies

Are you or your spouse/civil partner a Crown employee? Yes No

First country of tax residence

Tax identification type

Tax identification number (if UK, this will be your national insurance number)

Second country of tax residence

Tax identification type

Tax identification number

If you have a single country of nationality enter here

Dual nationality

Are you or your spouse/civil partner a Crown employee? Yes No

Are you UK tax resident? Yes No

If you are non-UK resident or hold more than one tax residence, please complete the 'Non-UK or Multiple tax residencies' section.

Countries of nationality

Section 2: Financial adviser's details

Adviser name	<input type="text"/>	Position	<input type="text"/>
Email address	<input type="text"/>	Telephone number	<input type="text"/>
Full name of regulated firm (or sole trader)	<input type="text"/>		
Financial Services number	<input type="text"/>		

Section 3: Data Privacy

To learn about how Aviva processes Personal Information, please see our privacy policy at [aviva.co.uk/privacypolicy](https://www.aviva.co.uk/privacypolicy). It's updated from time to time to take account of changes in our business activities, legal requirements and to make sure it's as transparent as possible, so please check back in to see the latest version. A paper copy can be provided on request by writing to: **Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR**

What happens next?

Once you return this form to platformJISAregisteredcontact@aviva.com, we'll email you to confirm the registered contact's shell account has been created.