

ISA

## Additional subscription form

This is an application form to pay an additional, one-off subscription or establish a regular subscription to an ISA by Direct Debit. It may also be used for a Junior ISA. Please do not complete this form if you want to change an existing regular subscription made by Direct Debit. To change an existing regular subscription by Direct Debit, you should either email us with your revised instruction via [contributions@investcentre.co.uk](mailto:contributions@investcentre.co.uk) or write to us at the address shown at the end of this form.

Please use **BLOCK CAPITALS** only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 83 99 060 or by email at [enquiry@investcentre.co.uk](mailto:enquiry@investcentre.co.uk).

### Checklist

**Yes, the cheque is included**

If the subscription is by cheque, then please ensure that you include it when you return this form to AJ Bell Investcentre. **Please note that, if you are subscribing for both tax years, you must provide a separate cheque for each year. The second cheque should be post-dated 07/04/2026.**

**Yes, the Direct Debit instruction is included**

For regular subscriptions, please ensure that you include a completed Direct Debit instruction.

**Yes, the adviser charging variation and additional payment form is included**

To vary the level of initial and ongoing adviser charges paid to the adviser under an existing agreement, please fill in the adviser charging variation and additional payment form.

### Important notes

1. All cheques must be made payable to 'AJ Bell Investcentre ISA re (client name)' e.g. AJ Bell Investcentre ISA re John Smith.
2. We will only accept payments from a UK bank account.

## Personal details

Title

Dr/Mr/Mrs/Miss/Ms/Other

Surname

Forename(s)

AJ Bell Investcentre account number

SCC

## Subscription

### Single subscription

The single subscription to be paid to the ISA is £ for the tax year ending 05/04/2026

The single subscription to be paid to the ISA is £ for the tax year ending 05/04/2027

If you are subscribing for both tax years, you must provide a separate cheque for each year. The second cheque should be post-dated 07/04/2026. **If we receive only one cheque for both subscriptions, this cheque will be returned.**

### Regular subscription

The regular subscription to be paid to the ISA is £ per month

Please be aware that if the subscription is to a Junior ISA and is a gift to the child then it cannot be repaid to the subscriber if, at a later date, the subscriber changes their mind.

## Declarations

The information contained in this form is correct to the best of my knowledge and belief and I undertake to notify AJ Bell Securities Limited of any changes without delay.

I confirm that I agree to be bound by the AJ Bell Investcentre terms and conditions.

Please sign and date this payment form and return it to **AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE**. Alternatively, you can email a scanned copy of the completed form to us – for cheque payments please use [contributions@investcentre.co.uk](mailto:contributions@investcentre.co.uk), and for electronic payments please use [cashapplications@investcentre.co.uk](mailto:cashapplications@investcentre.co.uk).

If the subscription is to a Junior ISA, the child cannot sign this form.

Name

Date

Signature

Capacity in which signed (please tick)

Adviser

Client

Parent/guardian

Please note that any adviser charges payable (if applicable) on the additional, single or regular subscriptions detailed in this form, will be calculated in line with the existing adviser charges levels currently in place on the ISA, unless an adviser charging variation and additional payment form is filled in.