

HARTLEY S&S JISA

MAKE TAX-EFFICIENT INVESTMENTS FOR YOUR CHILD WITH THE HARTLEY JUNIOR STOCKS & SHARES ISA (S&S JISA). SELECT A PLATFORM OF YOUR CHOICE AND START PLANNING FOR THE FUTURE TODAY.

TRANSPARENCY ON CHARGES

The charging structure of the Hartley S&S JISA is transparent. There are no hidden charges.

Hartley S&S JISA	Fees
Establishment Fee	£50 + VAT
Annual Administration Fee	£100 + VAT

The Establishment Fee of £50 + VAT covers your initial application, all of your JISA transfers in or cash subscriptions, and your investment administration. The Annual Administration Fee is charged in advance and covers the day-to-day administration of your ISA – including collecting JISA subscriptions, claiming tax relief, providing an annual valuation, and completing all HMRC and FCA reporting to maintain the tax efficiency of your JISA.

NO TRANSFER OUT FEES

We are so confident that you will be impressed with our service we do not charge a fee to transfer out.



THE PROFESSIONAL, PERSONAL TOUCH

Hartley have provided financial products to clients for over 35 years. We are not a call centre – your calls are answered by a trained financial industry professional. Every client gets their own personal administrator, who holds industry-recognised qualifications. To us, you are not just another customer – we understand that every client has specific requirements. We are here to make the complex world of investments simple.

IMPORTANT INFORMATION

Please read the Key Features Document and the Hartley S&S JISA Terms & Conditions in full prior to applying for the Hartley S&S JISA. These documents and further information can be found on our website.

Hartley are not authorised to give financial advice. We strongly recommend you seek independent financial advice from an FCA-authorised individual and tax advice from a suitably qualified tax adviser so they can tailor recommendations based on your personal circumstances and future.



Hartley Pensions Ltd

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