



Child Trust Fund (CTF) / Junior ISA (JISA) Transfer Form

Applicants must fully complete all sections.

If you have any queries about opening an account please call us on 01892 700834

In order to **protect your personal information** when sending back your form we recommend you use a recorded or tracked mail service.

This Transfer Form must be completed by the registered contact for the CTF account

A Junior ISA must be opened and an account number confirmed prior to the this Transfer Form being completed and submitted

If, for any reason, the transfer from the CTF is not successful, any JISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional JISA will be returned. The CTF will remain intact.

Applicants Details (Registered contact)

Title (eg. Mr/Mrs/Dr etc)

Full Name

Permanent residential address

Postcode

Contact Telephone Number

Email

I wish to transfer a CTF for:

Child's Title (if any)

Child's Full Name

Child's Address

Postcode

Child's Date of Birth

Child's Unique CTF Reference Number
Format (AB123456C)

Name of CTF Provider

Address of CTF Provider

Postcode

I wish to transfer the CTF (✓ Please tick as applicable)
in Stock Cash Both

JISA account number to which the CTF is being transferred

Declaration

I declare that I am the registered contact for the CTF
I authorise Jarvis Investment Management Ltd:

- To hold the child's subscriptions, investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and;
- To make on behalf of the child any claims to relief from tax in respect of JISA investments

I understand that the following stakeholder CTF features may not be included in a Junior ISA:

- Lifestyling from the age of 15
- Minimum subscriptions of £10 allowed
- Annual charge cap of 1.5%

Signed

Date

Please return the signed application form to:

Jarvis Investment Management Ltd, 78 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS

shareDeal active is a trading name of Jarvis Investment Management Ltd which is authorised and regulated by the Financial Conduct Authority (FRN 116413) a member of the London Stock Exchange and an HMRC authorised ISA manager.

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