



Child Trust Fund (CTF) Registered Contact Application Form

Before completing an application to become the CTF registered contact it is important that you are aware of the following:

- You will become the only person who can provide instructions about the CTF and the only person we will discuss the CTF with. This means that we would no longer be able to discuss the account with the existing registered contact
- You will receive all communications about the CTF, including statements and any other information we need to provide to meet our regulatory responsibilities
- Once you take on the role of registered contact this change is permanent. No other person may assume the role of registered contact should you later change your mind
- You will keep us informed if your personal details change

Important note: You must be the named CTF account holder and you must be at least 16 years of age before you sign and submit this form.

CTF account number

Applicant's title

Forenames (middle names can be initials)

Surname

Date of birth

National Insurance number (Child's Unique Reference Number)

Phone number

Email

* If you provide us with an email address we will register you for Online Account Management if this is available for your CTF. Once registered, we will email you Online Account Management terms and conditions to review and details of how to log in.

Address

Postcode

Please provide all information requested above.

Preferences

We'd like to contact you from time to time about OneFamily's products and services. You can choose if you'd like to receive this information by ticking the options below:

Please email me Please call me

Data Protection: Family Equity Plan Limited will hold your personal data in line with our Privacy Notice. The full version is here onefamily.com/privacy. It explains your rights as data subject and how we use your data. A copy is also available by writing to OneFamily, 16-17 West Street Brighton, BN1 2RL; by calling Customer Services on 0344 8 920 920* or, by email to customerservices@onefamily.com.

The information we provide should help you to make an informed decision as OneFamily doesn't provide advice on this product.

If you're not sure whether this product is suitable, it's worth speaking to an independent financial advisor (IFA).

Declaration and authorisation

I apply to become the registered contact for my Child Trust Fund.

I declare that:

- I am the CTF account holder (CTF named child)
- I am 16 years of age or over
- I will be the registered contact for the CTF

I authorise Family Equity Plan Limited

- to hold the HM Revenue & Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- to make on my behalf any claims to relief from tax in respect of CTF investments.

The full CTF terms and conditions will be provided when we confirm you as registered contact.

Signed

Date

*We're open 9am to 7pm Monday to Friday and 9am to 1pm on Saturdays. We might record your call to help improve our training and for security purposes. We hope you don't mind. Calls are normally free from UK landlines and from mobile phones. For further information please contact your service provider.