

## Child Trust Fund (CTF) account to Ethical Junior ISA transfer application form

Please complete this form if you'd like to transfer a CTF account to a OneFamily Ethical Junior ISA. You must be the Registered Contact of the existing CTF account. Please complete the form in BLOCK CAPITALS using black ink. Any amendments must be initialled.

By completing and returning the Transfer form you are confirming you have read and retained a copy of, the Important Information booklet, which contains the Key Features and Terms and Conditions, as well as the Key Investor Information document. If you have not been able to do this, please call us on 0800 616 695\*. These documents can be found at onefamily.com/junior-isa

Please note, we don't advise on or assess the appropriateness of this product for your child. If you feel you require further information about the account before applying please call **0800 616 695\*** and speak to a customer service representative. If you're not sure if this account is right for the child, you should seek independent financial advice.

## 1. Child's details

Title	Child's first name	Middle initial(s)														
Date of birth	e of birth DDMMYYYY Gender (please tick) Male Female															
Permanent UK r	esidential address															
			Postcode													
Child's Unique R	eference Number (if known)															

## 2. Your details

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Date of birth	C	D	Μ	Μ	Y	Y	Y	Y								^								λ	л						-				
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Home phone																				М	obi	ile p	pho	ne											
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We'd love to share exciting news and articles with you to help you manage your account and your money - you may even get the chance to enter a prize draw! In addition we will share offers with you from our carefully selected partners. You can choose if you'd like to receive this information by ticking the options below. We will hold your personal data in line with our Privacy Notice.

Email Phone

Details on how to pay into the Junior ISA will be sent to you once the new account has been opened

## 3. Authority to transfer into a Junior ISA

This page will be sent to your existing CTF provider as evidence of your wish to transfer. Please make sure you fill in all the requested information below, as this will help prevent delays in the CTF account being transferred.

Information abou	ıt you:																													
Title First name												Surname																		
Date of birth	DDMMYYYY							House number/name:																						
Information about the child:								Po	ostco	ode																				
Title First name														Surname																
Date of birth								He	ouse	nun	nbe	r/nc	ame:																	
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Information abou			to l	be tr	ans	ferr	ed:								~					~										
Name of existing CTF provider											r—			Exi	stin	ig C	TFp	orovi	der	ad	dres	s				<u> </u>	<u>ا</u>			
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Account number	of existing C	TF ac	cou	nt			-)r				r	-)(			Ļ					L		Ļ				L				Щ
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Child's Unique Re	ference Num	nber																								L				
(if known)																					Pos	tcod	e							
Additional inform	nation:																													
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• Minimum su	bscriptions o	f £10			o	Ar	nnuc	ıl m	ana	igem	nent	chc	arge c	ap of	1.5%	6														
Stakeholder featu	res are not a	vailabl	e or	n our	Jur	nior	ISA.	lf y	ou c	are a	pply	ing	to tro	nsfer	a st	akel	hold	er												
CTF account, plea	se tick this bo	ox to c	onfi	irm t	hat	you	und	lers	tanc	d this	an	d wo	ant to	proce	ed	:														
Estimated value of t	ransfer £				<b>-</b> .																									
Your existing CTF transfer can go al On transferring, th	nead. If you're	e not s	ure	wha	t co	ndit																								orm.
If the transfer of t will be returned.	he existing C	TF acc	oun	t is n	ot s	ucc	essfi	ul, v	ve v	vill b	e ur	nable	e to p	rocee	d w	vith c	per	ning	the	Jun	ior I	SA. A	Any	payr	nen	its a	ılrea	dy r	ece	ived
4. Declarati	on and	Tran	sfe	er /	4u1	the	orit	ły																						
I authorise Famil	y Equity Plar	n Limit	ed:									Tr	ansfe	er Auti	hor	ity:														
Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash and									tr	authorise my existing CTF provider as specified above to ransfer this CTF account to Family Equity Plan Limited																				
• To make on behalf of the child any claims to relief f respect of Junior ISA investments								from tax in Pla						I authorise my existing CTF provider to provide Family Equity Plan Limited with any information, written or non-written, concerning this CTF account and to accept any instructions from them relating to this CTF account transfer																
I declare that:															CIII	icia	ing	101	115 (	<u> </u>	acc	Jouri		1510						

- I am the existing Registered Contact for the CTF account and I have parental responsibility for the child
- I am 16 years of age or over
- The child is not a US citizen or resident in the US for tax purposes and I will inform Family Equity Plan Limited immediately if the child becomes a US citizen or so resident
- Where a notice period is required, or the CTF account has an investment that's not yet able to be sold, I instruct my existing CTF provider to (please tick one of the following):
  - > Wait for the full notice period to end, or wait until the investment(s) can be sold (whichever is relevant), before going ahead with this transfer.
  - > Proceed as soon as possible with the transfer I will accept any loss of interest, capital or charges applied as a result of this.

This Junior ISA will be managed under the terms outlined in the Key Features and Terms and Conditions provided with this application form. Before signing this application, you should read these terms carefully and contact us if there is anything you do not understand.

I accept the JISA Terms & Conditions and confirm that to the best of my belief the information on this form is true.

Signature 🗶 🛛	Date DDMMYYYY
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**Anti-money laundering.** We reserve the right to make authentication checks on the name and address of the applicant for the purposes of compliance with anti-money laundering legislation. We may use a credit reference agency to help us do this and by signing the application form you are agreeing to such checks.