



### 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 about you:

Title	First name	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	House number/name:
	<input type="text"/>	<input type="text"/>
Information about the child:	Postcode	<input type="text"/>

Title	First name	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	House number/name:
	<input type="text"/>	<input type="text"/>
Information about the CTF account to be transferred:	Postcode	<input type="text"/>

Name of existing CTF provider	Existing CTF provider address
<input type="text"/>	<input type="text"/>
Account number of existing CTF account	<input type="text"/>
<input type="text"/>	<input type="text"/>
Child's Unique Reference Number (if known)	<input type="text"/>
<input type="text"/>	<input type="text"/>
	Postcode <input type="text"/>

#### Additional information:

There are three types of CTF accounts: non-stakeholder cash accounts, non-stakeholder accounts that invest in stocks and shares, and stakeholder accounts. Stakeholder accounts have certain features, including:

- Minimum subscriptions of £10
- Annual management charge cap of 1.5%

Stakeholder features are not available on our Junior ISA. If you are applying to transfer a stakeholder

CTF account, please tick this box to confirm that you understand this and want to proceed:

Estimated value of transfer £ , .

Your existing CTF provider may have certain conditions on transferring the CTF account, and may need specific information from you before the transfer can go ahead. If you're not sure what conditions apply, please check with your existing CTF provider before completing this application form. On transferring, the existing CTF account will close.

If the transfer of the existing CTF account is not successful, we will be unable to proceed with opening the Junior ISA. Any payments already received will be returned.

### 4. Declaration and Transfer Authority

#### I authorise Family Equity Plan Limited:

- To hold the child's Government contributions, subscriptions, Junior ISA 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 Junior ISA investments

#### I declare that:

- 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

#### Transfer Authority:

- I authorise my existing CTF provider as specified above to transfer this CTF account to Family Equity Plan Limited
- 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
- 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 <input type="text"/>	Date <input type="text"/>
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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.