



Junior ISA transfer application form

Business Source

Reference

Please complete this form if you'd like to transfer a Junior ISA held with another provider to OneFamily. **You must be the Registered Contact of the existing Junior ISA.** Please complete the form in BLOCK CAPITALS using **black ink** (any amendments must be initialled). Details on how to pay into the account will be sent to you once it has been opened.

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 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) Child's surname

Date of birth Gender (please tick) Male Female

Permanent UK residential address

 Postcode

2. Your details (Remember, you must be the Registered Contact of the existing Junior ISA)

Title First name Middle initial(s) Surname

Date of birth Gender (please tick) Male Female

Permanent UK residential address (if different from above)

 Postcode

You can manage this Junior ISA online! Please provide your email address if you'd like more information about online account management:

Email

Home phone Mobile phone

For quick and easy access by phone please provide two security passwords:

A memorable name (e.g. your mother's maiden name) A memorable place (e.g. town of birth)

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](https://www.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.

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

*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.

