



The Stafford
Building Society

The CTF must be transferred in Cash

Please check your transfer request is permitted under the terms and conditions of your existing CTF provider prior to submitting the form. Please note that you may be contacted by your existing CTF provider.

Transfer authority and Declarations - to be completed by the CTF Registered Contact

I declare that I am the registered contact for the CTF and I have parental responsibility for the child or that I am aged 16 years or older.

I authorise my existing CTF provider as specified overleaf

- To transfer the CTF (Child's Unique CTF Reference Number) to Stafford Railway Building Society
- To provide Stafford Railway Building Society with any information, written or non-written concerning my CTF and to accept any instructions from them relating to the CTF being transferred

Where I must give notice to close or transfer part of the existing CTF, or the existing CTF contains an investment which is designed and intended to be held for a full term and has yet to reach redemption, I instruct my existing CTF provider to either: (tick the appropriate box)

1. Wait for the full notice period to end, or wait until redemption (whichever is relevant) before going ahead with this transfer; []

OR

2. Depending on the terms and conditions, carry out the transfer as soon as possible. I accept any consequential loss of income, capital or charges that may be applied. []

I authorise Stafford Railway Building Society

- 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 agree to the JISA terms and conditions

Signed

Date

Transfer acceptance (SRBS use only)

The Society is willing to accept this CTF transfer in line with your customers instructions above as long as the transfer proceed are made up of cash deposits only.

For the purposes of the transfer of the JISA wrapper under the ISA regulations, the date shown below will be the transfer date.

Signed for and on behalf of Stafford Railway Building Society

Signed

Date: