

Transfer Authority Form (Junior Cash ISA)

Child's personal details:

Title: First name(s): Surname:
Date of Birth: NI number (16 years or over):
Home Address:

Registered contact details:

Title: First name(s): Surname:
Date of Birth: NI number:
Home Address:
Telephone (home): (mobile):

Information about the Junior Cash ISA you want to transfer:

Name of existing provider: Account Number/JISA ref number:

Address of existing provider:

Sort code:

Transfers the full balance of the account Tick one box

Transfer part of the account balance
(Which must be to a JISA of the other type)

Amount to transfer is

If you are requesting a part transfer, amount of current year subscriptions to be included in the transfer
(Enter 'all' or specify an amount)

Please note: If the existing Junior Cash ISA is subject to a notice period with your current provider they will not complete the transfer until this has expired, unless you indicate otherwise by ticking the box below.

Please transfer the Junior Cash ISA immediately to Stafford Railway Building Society for which I accept responsibility for any charges or penalties that I may incur in respect of waiving the required notice period.

Transfer authority

I authorise my existing Junior ISA provider

- To transfer the Junior ISA (account/reference number overleaf) to Stafford Railway Building Society
- To provide Stafford Railway Building Society with any information, written or non-written concerning my Junior ISA and to accept any instructions from them relating to the Junior ISA being transferred

I agree to the Society's Junior Cash ISA terms & conditions and declare that this application has been completed to the best of my knowledge and belief.

- I am 16 years of age or over
- I am the child or have parental responsibility for the child
- I am the registered contact for the Junior Cash ISA
- To make on behalf of the child any claims to relief from tax in respect of Junior Cash ISA investments
- I have not subscribed and will not subscribe to another JISA of this type for this child
- I am not aware of other Junior ISA subscriptions that will result in this child exceeding the annual limit.
- I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded
- Only one Cash JISA can be held

Signed

Date

Transfer acceptance (SRBS use only)

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

Signed for and on behalf of Stafford Railway Building Society

Signed

Date