

**Transfer Authority Form – Child Trust
Fund to Junior Cash ISA (UK individually)**



**The Stafford
Building Society**

Customer ID(s):

(Office Use Only)

Account No:

Child's Personal Details

*Title	
*First name(s)	
*Surname	
*Date of Birth	
*National Insurance number (16 years or over)	
*Home Address	

Registered Contact Details

*Title	
*First name(s)	
*Surname	
*Date of Birth	
*National Insurance number (16 years or over)	
*Home Address	
Telephone (Home)	
Telephone (Mobile)	

Information About The Child Trust Fund (CTF) You Want To Transfer

*Name of existing provider	
*Childs unique CTF reference number	
* Address of existing provider	

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Please Note

The following Stakeholder CTF features may not be included in a Junior Cash ISA;

- **Lifestyling from age 15**
- **Minimum subscriptions of £10 allowed**
- **Annual charge cap of 1.5%**

If you are applying to transfer a stakeholder CTF tick this box to confirm that you understand this and wish to proceed:

As well as being subject to the terms and conditions of the JISA receiving the transfer proceeds, the transfer will be undertaken subject to the terms and conditions applying to your CTF.

For example:

- **Some CTF products may place conditions on how such a transfer is undertaken.**
- **Your existing CTF provider may need you to give them specific information before the transfer can go ahead.**

If you are not sure what conditions apply please check with your existing CTF provider before completing this form. If the transfer from the CTF is not successful, any JISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional JISA will be returned. The CTF status will remain intact.

Information About How The CTF Should Be Transferred

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.

The CTF must be transferred in Cash

Transfer Authority And Declarations

I authorise my existing CTF provider as specified overleaf:

- To transfer the CTF (Child's Unique CTF Reference Number) to The Stafford Building Society
- To provide The Stafford 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 The Stafford 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 declare that:

- I am 16 years of age or over,
- I am the registered contact for the CTF,
- I have parental responsibility for the child **or**,
- That I'm the child named above.
- I agree to the JISA terms and conditions, and I confirm that to the best of my belief that the information provided in this form is true.

Signed _____

Date _____

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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 and:

- These funds are received no later than _____

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 to The Stafford Building Society

Signed _____

Date _____