

Transfer Authority Form - Junior Cash ISA (UK individuals only)



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 Junior Cash ISA You Want To Transfer

| | |
|---------------------------------------|--|
| *Name of existing provider | |
| *Account number/JISA reference number | |
| *Sort code | |
| * Address of existing provider | |

The Stafford Building Society is a trading name for the Stafford Railway Building Society. The Stafford Railway Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct authority and the Prudential Regulation Authority. Register Number 206063

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Your Transfer Instructions

The ISA Regulations do not allow only part of a Cash JISA to be transferred to another Cash JISA. **(Therefore all Cash ISA to Cash ISA transfers must be made in full)**

* Have any subscriptions been made to this Cash JISA in the current tax year?

Yes No

If **YES**, total Subscription(s) made in the current tax year are: £ _____

* Please state the full amount to be transferred in, including this year's subscriptions

£ _____

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

Where I must give notice to close or transfer the existing Cash JISA, or the existing Cash JISA contains a fixed-term deposit that has not reached its maturity date, I instruct the existing JISA Provider to either: **(tick the appropriate box)**

1. Wait for the full notice period to end, or wait until the maturity date (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;

Transfer Declaration

I declare that:

- I am 16 years of age or over,
- I am the registered contact for the JISA,
- I have parental responsibility for the child **or**,
- That I am the child named above.
- 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.

Signed _____

Date _____

Transfer acceptance (SRBS use only)

The Society is willing to accept this JISA 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 _____