

Child Trust Fund (CTF) to Junior ISA: Transfer Authority

This transfer authority MUST be completed by the registered contact for the CTF account.

The following stakeholder CTF features might not be included in a Junior 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.

If the transfer from the CTF is not successful, any Junior ISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional Junior ISA will be returned. The CTF will remain intact.

Registered contact's title
(if any)

Full name

Registered contact address

Postcode

Child's address *(if different from Registered Contact)*

Postcode

Child's date of birth

Child's unique CTF reference number *(if known)*

I apply to transfer a CTF for

Full name

CTF provider account number

CTF provider details

Instructions to Existing Plan Manager

I hereby authorise you to provide James Sharp & Co with any information regarding the above specified Child Trust Fund, which they may request. I also authorise you to transfer this plan to James Sharp & Co upon their instruction to do so.

Please transfer this plan *(tick one)*

In cash In specie, plus cash on A/C

Signed

Date

I declare that I am the registered contact for the CTF;

I authorise James Sharp & Co.

- 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 Junior ISA investments.

FOR OFFICE USE ONLY

Account Name

Account Number