

THE F & T JUNIOR INDIVIDUAL SAVINGS ACCOUNT (JISA)

Child Trust Fund (CTF) to JISA Transfer Authority Form

This document must be completed by the registered contact for the CTF account. Please complete all sections.

CTF stakeholder features are not included in a Farley & Thompson JISA. If you are applying to transfer a stakeholder CTF, tick this box to confirm that you understand this and wish to proceed.

If for any reason 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 provisional subscriptions will be returned. The CTF will remain intact.

APPLICANT'S DETAILS
(Registered contact)

Mr/Mrs/Miss/Ms Surname

Full Forenames

Permanent residential address

Postcode

I apply to transfer a CTF for:

CHILD'S DETAILS

Master/Miss Surname

Full Forenames

Permanent residential address

Postcode

Child's Date of Birth / /

ACCOUNT(S)

Type of JISA you want to transfer into

To: The CTF provider

Their address

Postcode

Child's unique CTF reference no
(format AB123456C)

Dear Sirs,

I hereby authorise you to transfer the CTF in the undermentioned format to:

Farley & Thompson, Pine Grange, Bath Road, Bournemouth BH1 2NU. Tel. 01202 295000

(please tick as appropriate)

- Re-register the investment(s) in accordance with written instructions from Farley & Thompson and transfer these in specie together with the existing cash balance
- OR**
- Sell the investment (s) within the CTF and transfer the entire CTF as cash
- OR**
- Transfer the entire Cash CTF

I further authorise you to provide Farley and Thompson with any relevant information that they may require.

I declare that

- I am the registered contact for the CTF

I authorise Farley & Thompson

- To hold the child's subscriptions, investments, interest, dividends and 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.

Signed

Date.....