

Transfer Request Form Child Trust Fund (CTF) to Junior Cash ISA



This transfer application must be completed by the registered contact for the CTF account

Registered Contact

Title:		Full Name:	
Date of birth:			Contact number:
Address:			
	Postcode		

Minor (Child's Details)

Title:		Full Name:	
Date of birth:			Unique CTF Reference Number:
Address:			
	Postcode		

I apply to transfer a Child Trust Fund from

Current CTF Provider:	
Address	
	Postcode
CTF Account Number/Reference:	

The following stakeholder CTF features are not included in a Leek Building Society 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, please tick this box to confirm that you understand the above and wish to proceed:

☐

I confirm that the CTF will be transferred in cash and all existing investments will be sold ✓:

☐

Declaration

Where I must give notice to close or transfer part of the existing CTF, I instruct my existing CTF provider to:

1. Wait until the full notice period to end or until redemption before transfer (✓) ☐

Date of the maturity/end of the notice period:

Enter date here

or

2. Carry out the transfer as soon as possible, accepting any charges or loss of interest which may be applied (✓) ☐

I declare that I am the registered contact for the CTF. I authorise Leek Building Society:

- To hold the child's subscriptions, JISA 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 agree to the JISA terms and conditions.

I confirm I've received the Financial Services Compensation Scheme Information and Exclusions Sheet.

Signature:

Date:

Transfer Acceptance (this section is completed by Leek Building Society)

We, Leek Building Society, are willing to accept this CTF transfer in line with the Registered Contact's instructions above, as long as the following conditions are met:

We must receive all transfer proceeds no later than:

For the purposes of the transfer of the CTF under the CTF/JISA regulations, the date opposite will be the transfer date.

The name of the new JISA provider is Leek Building Society.

OFFICE USE ONLY

LBS JISA Account No:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--