

## CTF to Junior ISA

## Transfer and Application Form

### PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

Please complete both sides of this form if you would like to transfer your existing CTF to a Shepherds Friendly Junior ISA. The application form must be completed by the existing Registered Contact of the child's CTF. Please note that this form does not give authority to make any change to the Registered Contact of the CTF.

#### A Registered Contact details

1 Mr/Mrs/Ms/Miss/Other	2 Male <input type="checkbox"/> Female <input type="checkbox"/>
3 Forename(s)	4 Surname
5 Address	Postcode
6 Telephone No. (Home)	Telephone No. (Business)
Telephone No. (Mobile)	Email
7 Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

#### B Child's Details

1 Forename(s)	2 Surname
3 Male <input type="checkbox"/> Female <input type="checkbox"/>	
4 Address	Postcode
5 Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
6 National Insurance (NI) Number? (if your child has one)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

#### C CTF Transfer

##### I wish to transfer:

Current CTF provider	Child's Unique Reference Number
Address of current provider	

To:	Please tick box
The Shepherds With-Profits Stocks & Shares Junior Individual Savings Account	<input type="checkbox"/>
The Shepherds Unit-Linked Stocks & Shares Junior Individual Savings Account	<input type="checkbox"/>

#### D Important things to consider when transferring your CTF to a Junior ISA

- Minimum premiums of £10 are allowed
- The annual charge cap of 1.5% does not apply to the Shepherds Friendly With-Profits JISA

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.

## E Investment details

I apply to subscribe to a Shepherds Stocks and Shares Junior ISA for my child, for the current tax year 20\_\_\_\_ / 20\_\_\_\_ and each subsequent tax year until further notice, in accordance with the Terms and Conditions.

**I wish to invest:**

Regular Monthly Premium £ (Min £10 mthly) Lump Sum £ (Min £50)

## F Transfer authority and declaration - to be completed by the CTF Registered Contact

I declare that I am the registered contact for the CTF and I have parental responsibility for the child

I authorise the transfer of my existing CTF to the JISA specified above

I authorise Shepherds Friendly Society

- to hold the child's premiums, 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:**

- all premiums made, and to be made, belong to the child; • I am 16 years of age or over;
- I am the child/I have parental responsibility for the child; • I will be the registered contact for the Junior ISA.
- The child is resident in the United Kingdom, or is a UK Crown servant, a dependent of a UK Crown servant, or is married to/in a civil partnership with a UK Crown servant
- I have not subscribed and will not subscribe to another Junior ISA of this type for this child;
- I am not aware that this child has another Junior ISA of this type;
- I am not aware of other Junior ISA premiums that will result in this child exceeding the annual limit.

## G Consents

I declare that this application form has been completed to the best of my knowledge and belief.

The Shepherds Friendly Society Limited may use information provided in relation to this application to make electronic searches about me at Credit Reference Agencies that supply information, including information from the Electoral Roll, for the purposes of verifying my identity. I understand that these Agencies will record details of any such searches whether or not this application proceeds.

I understand that The Shepherds Friendly Society Limited reserve the right to request any such other documentary evidence it considers necessary to assist in the verification of my identity.

I understand that The Shepherds Friendly Society Limited may use information provided in relation to this application to process this application and for the ongoing management of my policy. Information may be held on computer, paper file or other appropriate medium for as long as the application is being considered, for as long as the policy remains in force and for an appropriate period thereafter.

Your information will be held by The Shepherds Friendly Limited. The information that you have supplied will be kept confidential and will not be disclosed to any other party without your consent unless it is lawful to do so.

It may be used to keep our records up to date, for business analysis and market research purposes and to advise you by post, telephone and /or electronic methods about any products and services offered by The Shepherds Friendly Society Limited and its subsidiaries that may be of interest to you. We may pass your details to other carefully selected organisations but only for the purposes mentioned above.

If you would like to request a copy of the information held about you please write to The Shepherds Friendly Society Limited Data Protection co-ordinator. A fee may be charged for providing information.

If you do not want to receive such marketing information please tick the box

**I agree to the JISA terms and conditions.**

Signature

Date

Full Name

**(BLOCK CAPITALS PLEASE)**

**The Shepherds Friendly Society Limited** Registered Office: Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL.

**Tel:** 0161 428 1212 **Fax:** 0161 428 3666 **Email:** info@shepherdsfriendly.co.uk **Web:** www.shepherds.co.uk

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The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.

