

Child Trust Fund (CTF) to JISA Transfer Application

For transferring a CTF from another provider into a Junior ISA account with Dudley Building Society. This transfer application **MUST be completed by the existing registered contact for the CTF account**. This form does not give authority to make any change to the Registered Contact of the CTF. Please complete sections 1 to 3 and send to the Dudley Building Society Customer Service Team at: 7 Harbour Buildings, The Waterfront, Brierley Hill, DY5 1LN or your local branch.

SECTION 1 – Registered contact Account holder

I apply to transfer a CTF for:

Title:

Title:

First Name(s):

First Name(s):

Surname:

Surname:

Address:

 Postcode:

Address:

 Postcode:

Contact Telephone No:

Child's Date of birth:

Date of birth:

National Insurance No. (if allocated):

SECTION 2 – Information about the CTF you want to transfer

Current CTF Provider:

CTF Provider address:

 Postcode:

Child's Unique CTF Reference Number:
 (Format AB123456C)

Please note

The following stakeholder CTF features may 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

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. For example:

- Some CTF products may place conditions on how such a transfer is undertaken.
- Your existing CTF provider may need you to give them specific information before the transfer can go ahead.

If you are not sure what conditions apply please check with your existing CTF provider before completing this form.

If 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 subscriptions to the provisional JISA will be returned. The CTF status will remain intact.

The CTF must be transferred in Cash

Please check your transfer request is permitted under the terms and conditions of your existing CTF provider prior to submitting the form. Please note that you may be contacted by your existing CTF provider to agree how the transfer of investments will be undertaken.

SECTION 3 – Transfer Authority and Declarations – 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 my existing CTF provider as specified above to transfer the CTF (unique reference number above) to Dudley Building Society

I authorise my existing CTF provider to provide Dudley Building Society with any information, written or non-written, concerning the CTF and to accept any instruction from them relating to the CTF being transferred.

Where I must give notice to close or transfer part of the existing CTF, or the existing CTF contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing CTF provider to either: (tick the appropriate box)

1. wait for the full notice period to end, or wait until redemption (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.

I authorise Dudley Building Society

- 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 JISA investments.

I agree to the JISA terms and conditions.

Usual Signature:

Date:

TRANSFER ACCEPTANCE BY DUDLEY BUILDING SOCIETY

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

We must receive all the transfer proceeds no later than:

Date form received in branch:

Branch identification:

Dept: Customer Services

Email: enquiries@dudleybuildingsociety.co.uk

Telephone No: 01384 231414

Address: 7 Harbour Buildings, The Waterfront, Brierley Hill, DY5 1LN