

Junior ISA Transfer Application Form

For transferring a Junior ISA (JISA) from another provider to Dudley Building Society.

Please complete sections 1 to 4 and forward to our Customer Service Team at 7 Harbour Buildings, The Waterfront, Brierley Hill, DY5 1LN or pass to a Customer Service Advisor dealing with your application in branch.

SECTION 1 – Account Holder and Registered Contact

Registered Contact		Account Holder																	
Title:		Title:																	
First Name(s):		First Name(s):																	
Surname:		Surname:																	
Address:	Street	Address:	Street																
	District		District																
	Town		Town																
	County		County																
	Postcode		Postcode																
Date of Birth:	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Date of Birth:	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y				
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SECTION 2 – Details of the Cash JISA to be transferred

Current Provider:			
Type of JISA with current provider:		(cash or stocks and shares)	
Current JISA No:			

SECTION 3 – Your transfer instructions

Transfer the full balance of the account	<input type="checkbox"/>	(Minimum balance of £100)
Transfer part of the account balance (which must be to a JISA of the other type)	<input type="checkbox"/>	Transfer Amount: £
If you are requesting a part transfer, amount of current year subscription to be included in the transfer. (Enter 'ALL' or specify an amount)		£

SECTION 4 – Transfer Authority and Declarations

- I declare that:
- I am 16 years of age or over
 - I am the child /I have parental responsibility for that child (delete which does not apply)
 - I am the registered contact for the JISA
- I authorise Dudley 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

Signature		Date:	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y				

Transfer Acceptance by Dudley Building Society

Dudley Building Society is willing to accept this investor's Cash JISA funds, subject to HMRC ISA Regulations.

For the purpose of the transfer of the JISA wrapper under the ISA Regulations, the date shown below will be the transfer date.

Date form received in branch:

D	D	M	M	Y	Y	Y	Y
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Branch ID:

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Dept: Customer Services
Email: enquiries@dudleybuildingsociety.co.uk
Tel No: 01384 231414
Address: 7 Harbour Buildings, The Waterfront, Brierley Hill, DY5 1LN