

Transfer Request Form Child Trust Fund to JISA



Protected



This transfer application must be completed by the registered contact for the Child Trust Fund (CTF) account.

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.

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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 will remain intact.

Applicant's Details

Title (if any):

First Name(s):

Surname:

Address:

Postal Town:

County:

Postcode:

Child's Details

Title (if any):

First Name(s):

Surname:

Address:

Postal Town:

County:

Postcode:

Date of Birth:

Unique CTF Reference Number (format AB123456C):

CTF Provider and
Address:

Postcode:

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

Signature:

Date:

Please ensure a JISA application is completed at the same time as this form.

OFFICE USE ONLY

Leek Building Society JISA
Account Number:

Leek Building Society Customer Service Centre, 50 St. Edward Street, Leek ST13 5DL
t: 0808 281 9308

Branches and agencies throughout Staffordshire, Cheshire, Shropshire and Derbyshire

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