

Transfer Authority Form from Child Trust Fund to Junior ISA

This transfer authority form **must** be completed by the Registered Contact of the child's Child Trust Fund. This form does not give authority to make any change to the Registered Contact of the Child Trust Fund.

Information about the Registered Contact

Title Mr Mrs Miss Ms Other
(please specify)

First name

Middle name(s)

Surname

Date of birth

Address line 1

Address line 2

Address line 3

Address line 4

Postcode

Contact phone number (including area code):

Email address

Information about the child

Title Mr Mrs Miss Ms Other
(please specify)

First name

Middle name(s)

Surname

Date of birth

National Insurance number:
 (if allocated)

Address line 1

Address line 2

Address line 3

Address line 4

Address line 5

Address line 6

Postcode

Information about the Child Trust Fund you want to transfer

Name of Child

Trust Fund provider:

Address of Child

Trust Fund provider:

Child Trust Fund Account
Number/Reference:

Child's Unique
Reference Number

Please note

The following stakeholder Child Trust Fund 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 Child Trust Fund, 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 Junior ISA receiving the transfer proceeds, the transfer will be undertaken subject to the terms and conditions applying to your Child Trust Fund. For example:

- Some Child Trust Fund products may place conditions on how such a transfer is undertaken.
- Your existing Child Trust Fund 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 Child Trust Fund provider before completing this form.

If the transfer from the Child Trust Fund is not successful, any Junior ISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional Junior ISA will be returned to the Registered Contact. The Child Trust Fund status will remain intact.

Information about how the Child Trust Fund will be transferred

Your Child Trust Fund will be transferred in cash. Any existing investments will be sold and transferred in cash.

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

Transfer declaration and authority – to be completed by the Child Trust Fund Registered Contact

I declare that I am the Registered Contact for the Child Trust Fund and I have parental responsibility for the child

I authorise my Child Trust Fund provider as specified above to transfer the Child Trust Fund (unique reference number above) to RBS Collective Investment Funds Limited.

I authorise my Child Trust Fund provider to provide RBS Collective Investment Funds Limited with any information, written or non-written, concerning the Child Trust Fund and to accept any instruction from them relating to the Child Trust Fund being transferred.

Where I must give notice to close or transfer the Child Trust Fund, or the Child Trust Fund contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my Child Trust Fund 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 RBS Collective Investment Funds Limited:

- 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 Junior ISA investments.

I agree to the Junior ISA Terms.

Signed:

Date: _____

Transfer acceptance (RBS Collective Investment Funds Limited fills this part in)

We, RBS Collective Investment Funds Limited, are willing to accept this Child Trust Fund to Junior ISA transfer in line with the Registered Contact's instructions above, as long as the following conditions are met:

We must receive all the transfer proceeds no later than .

For the purposes of the transfer of the Child Trust Fund under the Child Trust Fund/Junior ISA Regulations, the date shown below will be the transfer date.

Date:



Braille, large print or audio format?

If you'd like this information in another format, call us on
03457 888 444 (Minicom 0800 404 6161)