

Junior ISA Transfer Letter of Authority

Please complete one **Transfer Letter of Authority** for each provider/plan manager you wish to transfer from and return to us with your completed **Junior ISA Transfer Application**. Please print or photocopy additional copies of this form if required. If possible, a list of the investments you are transferring should also be submitted. For example, a copy of your last valuation statement.

Need help in completing this form? Call us on **020 7189 2400**.

Please complete all sections of this form in **BLOCK CAPITALS**

1. Parent's details

Please complete all sections with details of the parent or person with parental responsibility

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First Names (in full)

Permanent Residential Address

Postcode

Date of Birth

National Insurance Number

2. Child's details

Please complete all sections

Title

Surname

First Names (in full)

Permanent Residential Address

Postcode

Date of Birth

National Insurance Number

3. Details of investments being transferred

JISA Provider's/Plan Manager's Name

JISA Provider's/Plan Manager's Address

Postcode

Existing JISA Account No./Reference

Sort Code (cash JISAs only)

Approximate Transfer Value

£

4. Please take this authority to transfer my entire (Please tick one choice only)

a) Type of JISA

Stocks & shares JISA or Cash JISA

b) Transfer Method

Stock/funds (in specie) or Cash

c) Current year subscription: does this transfer include your JISA subscription for the current tax year?

Yes or No

5. Declaration & signature

By signing below, I authorise the JISA Manager named above to:

- Provide Evelyn Partners Investment Management Services Limited and their appointed custodian, SEI Investments (Europe) Ltd, with any information they may require in respect of the Junior ISA being transferred
- Either transfer my holdings to Bestinvest's appointed custodian, SEI Investments (Europe) Ltd, or liquidate the assets within my Junior ISA with immediate effect, and forward the proceeds to Bestinvest's appointed custodian
- Stop collecting my regular savings with immediate effect if I have chosen to transfer my current tax year Junior ISA

By signing below I agree to the above declaration

Name <input type="text"/>	
<input type="text"/>	Date <input type="text"/>

X PLEASE SIGN HERE **X**

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Once completed, please return this form to: **Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY**