Child Trust Fund to Junior ISA Transfer Authority

Bestinvest by Evelyn Partners

This transfer authority must be completed by the registered contact for the Child Trust Fund account.

Need help in completing this form? Call us on **020 7189 9999**.

Complete all sections of this form in **BLOCK CAPITALS**

1. Stakeholder child trust fund (CTF) features

The following stakeholder CTF features might 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. ☐

If the transfer from the CTF 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. The CTF will remain intact.

2. Registered contact's details

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

First Names (in full)

Registered Contact's Address

Postcode

Email Evening Telephone Number Daytime Telephone Number

3. Child's details

Child's Title (if any) Surname

First Names (in full)

Child's Address

Postcode

Child's Date of Birth (D D M M Y Y Y Y)

Child's Unique CTF Reference Number (format AB123456C)

Existing CTF Account No./Reference (if applicable)

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4. Please take this authority to transfer my entire CTF (please complete each section)

CTF Provider

Approximate Transfer Value £

CTF Provider's Address

Postcode

5. Transfer method (please select one option from a or b below.)

a) Cash ☐ b) Stocks/Funds (in specie) ☐

☐ If you have selected option b); I authorise Bestinvest to instruct the sale of any assets held within the Child Trust Fund account and the proceeds transferred to them as cash in the event an **in specie** transfer cannot be processed. I understand that I will need to invest the cash myself if I am availing of the Online Investment Service.

6. Marketing communications

We'd like to send you some occasional updates, such as news, investment guides and invitations to events. You can unsubscribe at any time and you'll find full details of how we use and secure your personal information in our privacy notice

www.bestinvest.co.uk/help/privacy-notice

If you would rather not hear from us please tick the relevant box below.

Email ☐ Phone ☐ Post ☐

7. Declaration & signature

- I am the registered contact for the CTF.

I authorise Evelyn Partners Investment Management Services Limited ("Bestinvest") to:

- Hold the child's subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash and
- To make on the child's behalf any claims to relief from tax in respect of CTF investments
- Provide their appointed custodian, SEI Investments (Europe) Ltd, with any information they may require in respect of the Child Trust Fund being transferred.
- Either transfer my holdings to Evelyn Partners Investment Management Services Limited's appointed custodian, SEI Investments (Europe) Ltd, or liquidate the assets within my Child Trust Fund with immediate effect, and forward the proceeds to Evelyn Partners Investment Management Services Limited appointed custodian.
- Stop collecting my regular savings with immediate effect in relation to the Child Trust Fund

By signing below I agree to the above declaration

Name

X PLEASE SIGN HERE X

Date D D M M Y Y Y Y

Once completed, please submit by either:

- **Signing this form digitally** using Adobe sign.
- **Printing out and posting** to Online Investment Service, Bestinvest, Evelyn Partners, 45 Gresham Street, London EC2V 7BG.
- **Scanning the form and emailing** to best@bestinvest.co.uk

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