

## JUNIOR ISA

# Child Trust Fund to Junior ISA transfer form

This is an application form to transfer an existing Child Trust Fund (CTF) to a Junior ISA with AJ Bell Youinvest. Please note that you must first open a Junior ISA online at [www.youinvest.co.uk](http://www.youinvest.co.uk) before you complete this transfer form. The whole CTF will be transferred to the Junior ISA and the CTF will then be closed. The AJ Bell Youinvest Junior ISA is a stocks and shares Junior ISA.

Only the registered contact of the CTF can complete and sign this transfer form. Please note that if anyone other than the registered contact signs this form, the transfer will be declined by the current CTF provider.

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.

If you are considering transferring investments to us as part of this transfer, we recommend you contact your current CTF provider and ask if this is possible. If the CTF provider cannot transfer the investments, they may sell them and transfer as cash instead.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at [enquiry@youinvest.co.uk](mailto:enquiry@youinvest.co.uk).

You must complete all details requested on the following page and sign the declaration. Once completed please return the form to us at the address below.

AJ Bell Youinvest  
4 Exchange Quay  
Salford Quays  
Manchester  
M5 3EE

### Registered contact's details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Permanent residential address

Postcode

## Child's details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Account number

Date of birth

Permanent residential address

Postcode

## Declaration

Only the registered contact of the CTF can complete and sign this transfer form.

I declare that

1. I have read, understood and retained a copy of the AJ Bell Youinvest Junior ISA key features and terms and conditions.
2. I acknowledge that the details contained therein and this application form, constitute the agreement between me and AJ Bell Securities Limited.
3. On my written request AJ Bell Securities Limited will allow me to withdraw on the terms laid down in the terms and conditions.
4. I understand and accept that AJ Bell Securities Limited accepts no responsibility for any losses incurred as a result of any delays in the transfer to the AJ Bell Youinvest Junior ISA.
5. The declaration and information contained in this form is correct to the best of my knowledge and belief and I undertake to notify AJ Bell Securities Limited of any changes without delay.

**Please note that if anyone other than the registered contact signs this form, the transfer will be declined by the current CTF provider.**

Registered contact's name

Date

Registered contact's signature

## CTF transfer authority

The following stakeholder CTF features are not included in the AJ Bell Youinvest 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.

I apply to transfer a CTF to an AJ Bell Youinvest Junior ISA.

CTF unique reference number

Approximate transfer value

£

CTF provider's name

CTF provider's address

Postcode

Does the CTF only hold cash?

Yes

No (please tick one option only)

If no, please transfer any investments held as

Investments

Cash (please tick one option only)

### IMPORTANT NOTES

If your transfer to us includes any funds that are not clean funds, and a clean fund equivalent exists, we will convert these funds into their clean fund equivalent. If there is no clean fund equivalent we will hold the fund in its existing form, but will be entitled to convert it in future if a clean fund equivalent is created.

I authorise AJ Bell Securities 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 confirm that I have not received any advice or recommendation in relation to the transfer from a representative of AJ Bell Youinvest or AJ Bell Securities Limited.

**I declare that I am the registered contact for the CTF.**

Registered contact's name

Date

Registered contact's signature

