

JUNIOR ISA

Transfer form

This form lets you transfer an existing Junior ISA into a Junior ISA with AJ Bell Youinvest.

If you wish to transfer a Child Trust Fund to a Junior ISA please use the Child Trust Fund transfer form.

If you don't already have an AJ Bell Youinvest Junior ISA you'll need to apply for one using our online application process before completing this form.

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.

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

Child's personal details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

AJ Bell Youinvest Junior ISA account number

Date of birth

Permanent residential address

Postcode

Country

Please ensure that the child's personal details held with the scheme you're transferring from match the above as differing details may delay your transfer.

Declaration

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.
6. For transfers from cash Junior ISAs only. I understand that the cash I am transferring will be transferred into a stocks and shares Junior ISA.

Please print your name, sign and date below to confirm you have read and understood the above declarations. You'll also need to sign the transfer authority section on the next page.

Parent's/guardian's name

Date

Parent's/guardian's signature

Junior ISA transfer authority

Please complete one authority for each Junior ISA you wish to transfer. The transfer can be from either a cash or a stocks and shares Junior ISA.

Please print more copies of this form if you have additional Junior ISA to transfer to us.

The Junior ISA reference to be transferred

Approximate transfer value

£

This is a full transfer

This is a partial transfer

ISA manager's name

ISA manager's address

Postcode

Please take this authority to transfer my Junior ISA (please choose one box only):

<p>Stock and shares ISA</p> <p>Please transfer my stocks and shares Junior ISA to AJ Bell Youinvest as:</p> <p>Investment <input type="checkbox"/> OR Cash <input type="checkbox"/> Both <input type="checkbox"/></p>	or	<p>Cash ISA</p> <p>Please transfer my cash Junior ISA with the sort code to your Junior ISA</p> <p><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/></p>
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Important notes

You are only able to hold one stocks and shares Junior ISA at a time. A transfer from another stocks and shares Junior ISA must be made in full and result in the original Junior ISA being closed. You are only able to make a partial transfer to an AJ Bell Youinvest Junior ISA from a cash Junior ISA.

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.

Junior ISA transfer authority (continued)

I authorise the ISA Manager I've stated above to transfer my existing Junior ISA to AJ Bell Youinvest, to close my Junior ISA if I'm transferring it out in full, and to stop collecting any existing regular payments.

I authorise my ISA Manager specified above to provide AJ Bell Youinvest or AJ Bell Securities Limited with any information they request regarding my Junior ISA above. I agree that a copy of this authority should have the same validity as the original.

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.

Parent's/guardian's name	Date
<input type="text"/>	<input type="text"/>
Parent's/guardian's signature	
<input type="text"/>	

Assets to be transferred

If you're transferring US or Canadian stocks to your Junior ISA, you'll need to complete and forward us:

- For US stocks, form W-8BEN
- For Canadian stocks, form NR301

You can find both of these forms within the 'Useful forms' area of our website.

Your transfer to us will be delayed if we don't receive the above information.

What happens next?

Once we receive your completed transfer form, we'll contact your existing ISA manager to start the transfer. The length of time the transfer will take can vary, depending on the following factors:

- The type of investments you're transferring. As a guide, cash only should take 2-4 weeks, shares 4-6 weeks, funds 6-8 weeks and foreign holdings 10-12 weeks. If you're transferring cash and investments, your cash will be transferred to us after your investments
- How long it takes your current Junior ISA manager to respond to our requests
- Whether the documentation required by us or your current provider is completed correctly
- Whether you still have to pay fees to your current provider, including closure and administration fees

If you're transferring investments, you can track the progress of your transfer, just log in and click on 'Transfers'.