

SIPP

ISA

Dealing

Junior ISA

Junior ISA transfer form

This is a form to transfer in 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.

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 details

Title	<input type="text"/>	Surname	<input type="text"/>
Forename(s)	<input type="text"/>		
Date of birth	<input type="text"/>		
AJ Bell Youinvest Junior ISA account number	<input type="text"/>		
Permanent residential address	<input type="text"/>		
	<input type="text"/>		
Postcode	<input type="text"/>	Country	<input type="text"/>

Declarations

I declare that

1. I have read, understood and retained a copy of the AJ Bell Youinvest 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 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 ISAs only. I understand that the cash I am transferring will be transferred into a stocks and shares ISA.

Parent's/guardian's name Date

Parent's/guardian's signature

ISA transfer authority

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

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

The 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 ISA (please choose one box only):

<p>Stock and shares ISA</p> <p>Please transfer my stocks and shares 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 ISA with the sort code</p> <p><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/></p> <p>to your Junior ISA</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.

