

[SIPP](#)
[ISA](#)
[Dealing](#)
[Junior ISA](#)

# Junior SIPP transfer in form

## Transferring customer instructions

This form is your authority to transfer benefits from another registered pension scheme into a Junior SIPP with AJ Bell Youinvest.

If you don't already have an AJ Bell Youinvest Junior SIPP please apply for one using our online application before completing this form.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate. Once completed please return the form to us at the address below.

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

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).

## To be completed for the transferring child

Full name of child

SIPP account number  Date of birth

Address of child

Postcode

Full name of transferring scheme (where known)

Existing plan number or policy number under transferring scheme

Full name of administrator of transferring scheme

Address of administrator of transferring scheme

Postcode

Is the transfer cash only? Yes  No

Approximate fund value to be paid to the receiving scheme  £

Does this represent the full value of the plan? Yes  No

For a transfer of investments, please provide the name and address of the existing investment manager/stockbroker (if applicable). Please also provide details of the investments being transferred and their values in the assets to be transferred section below. If this section is not complete this may lead to delays in processing the transfer.

Name of stockbroker

Address of stockbroker

Postcode  Country

## Assets to be transferred

Assets name/description	SEDOL/ISIN	Units	Value (£)

Please continue on a separate sheet if necessary.

### IMPORTANT NOTE

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.

## Request for transfer

I authorise and instruct you to transfer funds from the plan as listed in this form directly to the receiving scheme in the form of

1. A cash payment made by cheque, or such other method agreed with AJ Bell Youinvest or
2. An in specie transfer of assets held on my behalf (after deduction of any outstanding liabilities or charges). Where appropriate AJ Bell Youinvest will advise details of the nominee/parties to whom assets must be transferred. I understand that the existing investment manager or administrator of the transferring scheme is responsible for collecting dividends and tax reclaims and realising all rights and entitlements in respect of the assets transferred and for passing them to the receiving scheme.

Where you have asked me to give you any original policy documents in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer listed in this form.

I authorise you to release all necessary information to AJ Bell Youinvest or AJ Bell Management Limited or Sippdeal Trustees Limited to enable the transfer of funds to the receiving scheme. I agree that a copy of this authority will have the validity of the original.

Until this application is accepted and complete, the receiving scheme administrator's responsibility is limited to the return of the total payments to the current plan.

Where the payment made to the receiving scheme represents all of the funds under the plan listed in this form, then payment made as requested will discharge the current provider of all claims and responsibilities in respect of the plan listed.

Where the payment made to the receiving scheme represents part of the funds under the plan listed in this form, then the current provider will be discharged of all claims and responsibilities only in respect of the part of the plan represented by the payment.

I promise to accept responsibility in respect of any claims, losses and expenses that AJ Bell Youinvest or AJ Bell Management Limited or Sippdeal Trustees Limited and the current provider may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

I request the scheme administrator of the receiving scheme to accept the transfer from the transferring scheme and to pay it into the SIPP for the child detailed on page one. I confirm that the information provided relevant to this application to transfer benefits into the SIPP for the child detailed on page one is correct and complete to the best of my knowledge and belief.

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

Parent/guardian's name

Date

Parent/guardian's signature