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**Junior ISA Transfer Form**

This form lets you transfer an existing Junior ISA into a Junior ISA with YOUR Platform.   
  
Seccl Custody Limited (SCL) is the Junior ISA Manager in respect of YOUR Junior ISA. SCL is approved by HM Revenue & Customs for this purpose. YOUR Junior ISA managed by SCL is a stocks and shares JISA.  
  
If you do not already have a YOUR Junior ISA (JISA) you will need to apply for one before submitting this form.  
  
Please send this form once completed and signed to our central mailbox [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk) and [transfers@seccl.tech](mailto:transfers@seccl.tech) **Please note:** we will not accept cheques or postal forms.

**Your details**

|  |  |
| --- | --- |
| Title (if any) | <<Insert Details>> |
| Full name | <<Insert Details>> |
| National insurance number | <<Insert Details>> |
| Date of Birth | <<Insert Details>> |
| Email address | <<Insert Details>> |
| Sort Code (if applicable) | <<Insert Details>> |
| Permanent residential address | <<Insert Details>> |
| YOUR Platform reference | <<Insert Details>> |

**I apply to transfer a JISA for:**

|  |  |
| --- | --- |
| Child’s title (if any) | <<Insert Details>> |
| Full name | <<Insert Details>> |
| National insurance number (if available) | <<Insert Details>> |
| Child’s Date of Birth | <<Insert Details>> |
| Sort Code (if applicable) | <<Insert Details>> |
| Child’s permanent residential address | <<Insert Details>> |
| YOUR Platform account number | <<Insert Details>> |

**JISA Transfer Authority**

|  |  |
| --- | --- |
| Current JISA provider | <<Insert Details>> |
| Current JISA account number | <<Insert Details>> |
| Type of JISA with current provider | (Cash or stocks and shares) |
| Partial or full | <<Insert Details>> |
| Amount to transfer (if partial) | <<Insert Details>> |
| In-specie or cash | <<Insert Details>>  *(if partial please list assets to transfer)* |
| Value of current year subscriptions to be included in the transfer | (please enter amount) |

**Declaration**

I declare that

* I have read and understood YOUR JISA terms and key feature document
* I am the child or I have parental responsibility for that child
* I am the registered contact for the JISA
* I give authority to YOUR Platform and the ISA manager (Seccl Custody Ltd) to transfer my ISA
* Information that provided in this application is correct to the best of my knowledge. I will notify YOUR Platform of any changes to the information provided.
* (For transfers from Cash JISAs only) I understand that the Cash JISA I am transferring is to be transferred into the YOUR stocks and shares JISA.
* I accept that YOUR Platform will not be liable to any losses incurred as a result of any delays in the transfer to YOUR JISA.

**Transfer Instruction**

* I hereby authorise my existing ISA provider to:
* Transfer my existing JISA as specified to YOUR Platform
* Provide any information necessary to YOUR Platform to facilitate the transfer
* Cancel any direct debits currently in place with immediate effect if I have chosen to transfer my current tax years subscriptions
* Deduct any charges for the transfer as specified within your terms and conditions

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Parent’s/guardian’s name | <<Insert Details>> |
| Date | <<Insert Details>> |
| Parent’s/guardian’s signature | <<Insert Details>> |

**Transfer Acceptance**

For the attention of the ceding provider.

Please make the payment to the following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 308012

Payment Reference: INVST – Account ID

Please note, we do not accept payment by cheque.

Please send all correspondence relating the transfer to [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk) and [transfers@seccl.tech](mailto:transfers@seccl.tech), including the investor’s contributions from this tax year for HMRC reporting purposes.

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