

**Child Trust Fund to Junior ISA Transfer Form**

Use this form to transfer an existing Child Trust Fund (CTF) into a Junior ISA account with YOUR Platform. Please note that the whole CTF will be transferred into the Junior ISA and the CTF will then be closed.

Seccl Custody Limited (SCL) is the is the Junior ISA Manager in respect of the YOUR Junior ISA. SCL is approved by HM Revenue & Customs for this purpose. The YOUR Junior ISA managed by SCL is a stocks and shares JISA.

If you do not already have a YOUR Junior ISA, you will need to apply for one before submitting this form.

If the transfer of the CTF is not successful, then the Junior ISA will be invalid. Any subscriptions will be returned, and the Junior ISA account will be closed. The CTF will remain active.

**Your details**

NB: You must be the registered contact for the CTF. Any application from a person who is not the registered contact will be rejected.

|  |  |
| --- | --- |
| Title  |       |
| Full Name |       |
| National Insurance Number  |       |
| Date of Birth |       |
| Email Address |       |
| Permanent Residential Address |       |
| YOUR Platform JISA Account Number |       |

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

|  |  |
| --- | --- |
| Child’s Title (if any) |       |
| Full Name |       |
| Child’s URN (Unique Reference Number – same format as NINO) |       |
| Child’s Date of Birth |       |
| Child’s Permanent Residential Address |       |

**CTF Transfer Authority**

The following Stakeholder CTF features are not available in the YOUR Junior ISA

* Life styling from age 15
* Minimum subscriptions of £10 allowed
* Annual charge cap of 1.5%

If you are applying to transfer a Stakeholder CTF, please tick this box to confirm you understand this and wish to proceed. [ ]

|  |  |
| --- | --- |
| Current CTF Provider |       |
| CTF Unique Reference Number |       |
| CTF Provider Address |       |
| CTF Transfer Department Email Address (if known) |       |
| Does the existing CTF hold only cash? |       |
| Do you wish to transfer investments held in-specie? |       |

**Declaration**

I declare that:

* I have read and understood the [ISP] 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 the [ISP] and the ISA manager (Seccl Custody Ltd) to transfer my CTF
* Information that provided in this application is correct to the best of my knowledge. I will notify the [ISP] of any changes to the information provided.
* I understand that the CTF I am transferring is to be transferred into the [ISP] stocks and shares JISA.
* I accept that the [ISP] will not be liable to any losses incurred as a result of any delays in the transfer to the [ISP] JISA.
* If for any reason, the transfer from the CTF is not successful, any JISA that has been opened on a provisional basis to accept the CTF transfer will be void, and any subscriptions to the provisional JISA will be returned per void JISAs, the CTF will remain intact.

**Transfer Instruction**

I hereby authorise my existing CTF provider to:

* Transfer my existing CTF as specified to [ISP]
* Provide any information necessary to the [ISP] 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
* If the transfer of the CTF is not successful, then the Junior ISA will be invalid. Any subscriptions will be returned, and the Junior ISA account will be closed. The CTF will remain active
* Deduct any charges for the transfer as specified within your terms and conditions

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Registered Contact Name |       |
| Date |       |
| Registered Contact Signature |       |

**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: 30-80-12

Payment Reference: INVST- <<YOUR SIPP Reference Number>>

**Please note**: we do not accept cheques or postal forms.

Please send this completed form to Questions@YOUR-Platform.co.uk. Please send all correspondence relating to the transfer, including the investor’s contributions from this tax year (for HMRC reporting purposes) to support@seccl.tech.