Logo, company name

Description automatically generated**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 Junior ISA.

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

**Your details**

|  |  |
| --- | --- |
| Title (if any) |  |
| Full Name |  |
| National Insurance Number |  |
| Date of Birth |  |
| Email Address |  |
| Sort Code (If applicable) |  |
| Permanent Residential Address |  |
| YOUR Platform Reference |  |

Logo, company name

Description automatically generated**I apply to transfer a JISA for:**

|  |  |
| --- | --- |
| Childs title (if any) |  |
| Full Name |  |
| National Insurance Number  (if available) |  |
| Child’s Date of Birth |  |
| Child’s Permanent Residential Address |  |
| YOUR Platform account number |  |

**Junior ISA Transfer Authority**

|  |  |
| --- | --- |
| Current JISA provider |  |
| Current JISA account number |  |
| Current JISA sort code (if applicable) |  |
| Type of JISA with current provider |  |
| Partial of Full? |  |
| Amount to transfer (if partial) |  |
| In-specie or Cash? |  |
| Value of current year subscriptions to be included in the transfer |  |

**Declaration**Logo, company name

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I declare that:

* I have read and understood YOUR Platform JISA terms and conditions and key features 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 ISA manager (Seccl Custody Limited) to transfer my JISA;
* Information 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 JISA provider to:

* Transfer my existing JISA as specified to YOUR Platform JISA;
* Provide any information necessary to YOUR Platform and SCL 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 |  |
| Date |  |
| Parent’s / Guardian’s signature |  |

**Transfer Acceptance**Logo, company name

Description automatically generated

*For the attention of the ceding provider*

Please make the payment to following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 30-80-12

Payment Reference: INVST- <<YOUR Platform JISA Account Number >>

**Please note: We do not accept cheques or postal forms**

Logo, company name

Description automatically generated

Please send all correspondence relating to 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.

Seccl Custody Limited is the custodian of assets held on the platform and is authorised and regulated by the Financial Conduct Authority, Registration No. 793200 and registered in England and Wales No. 10430958. Registered office 20 Manvers Street, Bath BA1 1JW.