Logo, company name

Description automatically generated**Child Trust Fund to Junior ISA Transfer Form**

This form lets you 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 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 (if any) |  |
| Full Name |  |
| National Insurance Number |  |
| Date of Birth |  |
| Email Address |  |
| Permanent Residential Address |  |
| YOUR Platform JISA Account Number |  |

Logo, company name

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

|  |  |
| --- | --- |
| Childs 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 any cash? |  |
| Do you wish to transfer investments held In-specie? |  |

**Declaration**Logo, company name

Description automatically generated

I declare that:

* I have read and understood the 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 the ISA manager (SCL) to transfer my CTF
* Information that is provided in this application is correct to the best of my knowledge. I will notify YOUR Platform of any changes to the information provided
* I understand that the CTF I am transferring is to be transferred into the YOUR Platform socks 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 the YOUR 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. Any subscriptions to the provisional JISA will be returned per void JISAs and the CTF will remain intact

**Transfer Instruction**

I hereby authorise my existing CTF provider to:

* Transfer my existing CTF 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;
* 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**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.