

FOR SOCIETY USE	Account Number	Cust No(s)

This transfer authority form must be completed by the existing Registered Contact of the child's CTF. This form does not give authority to make any change to the Registered Contact of the CTF. The Registered Contact for the CTF and the Junior Cash ISA must be the same person.

To transfer your existing Junior CTF to Scottish Building Society, please complete this form using **BLOCK LETTERS** throughout. Completed forms require a handwritten signature and should be sent to us at: Scottish Building Society, SBS House, 193 Dalry Road, EDINBURGH EH11 2EF. You can also hand in your form at your nearest Scottish Building Society Relationship Centre. If you do not already have a Junior Cash ISA with Scottish Building Society, please also complete a new account application form.

This form must be completed by the Registered Contact who is named on the account.

Please complete all the relevant sections and remember to sign and date this form. If you do not sign it, we will be unable to contact your current CTF provider to arrange the transfer.

CHILD'S PERSONAL DETAILS

Title

Forename(s)

Surname

Address

Postcode

Date of Birth

National Insurance Number (if the child is over 16)

REGISTERED CONTACT DETAILS

Title

Forename(s)

Surname

Address

Postcode

Date of Birth

National Insurance Number

Phone Number

INFORMATION ABOUT THE CHILD TRUST FUND (CTF) YOU WANT TO TRANSFER

Name of existing provider

CTF account number/reference

Child's unique reference number

Address of existing provider

Information about how the CTF should be transferred

Please check your transfer request is permitted under the terms and conditions of your existing CTF provider prior to submitting the form. Please note that you may be contacted by your existing CTF provider.

The CTF must be transferred in Cash.

TRANSFER AUTHORITY & CUSTOMER DECLARATION

Please read, complete and sign.

Important Information – it is essential that you read and understand the terms within this declaration before signing below.

I authorise my existing/the child's CTF provider (as specified above) to transfer the CTF (account number above) to Scottish Building Society. I authorise my existing/the child's CTF provider manager to provide Scottish Building Society with any information about the account and to accept any instructions from them relating to the CTF being transferred. Where I must give notice to close and transfer the existing CTF or the existing CTF contains a fixed-term deposit that has not reached its maturity date, I instruct my existing CTF provider to either (please tick as appropriate):

1. Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer.

or

2. Depending on the terms and conditions, carry out the transfer as soon as possible – I will accept any consequential loss of interest or charges which may be applied.

Please note if transferring an existing stakeholder CTF, the following stakeholder features might not be included in a Junior ISA:

- Lifestyling from age 15
- Minimum subscription of £10 allowed
- Annual charge cap of 1.5%

If you are applying to transfer a stakeholder CTF, tick this box to confirm that you understand this and wish to proceed.

If you are transferring from a stocks and shares or stakeholder CTF to a cash Junior ISA (JISA) it is important that you understand the implications of this transfer. We are not able to give advice. If you are not sure whether a cash JISA is the best option for your/your child's savings we suggest you obtain independent advice.

If you are transferring from a CTF that holds stocks and shares, these investments will have to be sold. It is possible that you could lose out if there is a rise in the market whilst the transfer is being completed and we do not accept liability for any such loss.

The existing CTF may require you to give notice in advance if you wish to withdraw funds or it may have a fixed term before which the funds can't be withdrawn without loss of interest. Charges may apply if you instruct us to immediately transfer funds in these accounts.

If the transfer from the CTF is not successful, any JISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional JISA will be returned. The CTF will remain intact.

I declare that:

- I am the Registered Contact for the CTF.
- I am 18 years of age and over.
- I have parental responsibility for the child.
- I will be the Registered Contact for the Junior ISA.
- I agree to the Junior Cash ISA terms and conditions.

As well as being subject to the terms and conditions of the JISA receiving the transfer proceeds, the transfer will be undertaken subject to the terms and conditions applying to your CTF. For example:

- Some CTF products may place conditions on how such a transfer is undertaken.
- Your existing CTF provider may need you to give them specific information before the transfer can go ahead.
- If you are not sure what conditions apply please check with your existing CTF provider before completing this form.
- I accept that the Society may decline my application.
- I consent and acknowledge that the Society may carry out an electronic check to verify my identity.

I authorise Scottish Building Society:

- To hold the child's subscriptions and any interest earned on those subscriptions.
- To make on the child's behalf any claims to relief from tax in respect of JISA investments.

Before signing this form please:

- **note that all funds transferred or paid into this account cannot be withdrawn until the child's 18th birthday.**
- **read our Customer Privacy Notice carefully, you can find it online or at our Relationship Centres. A copy is also provided when a Junior Cash ISA account is opened.**

REGISTERED CONTACT
SIGNATURE



DATE

TRANSFER ACCEPTANCE

TO BE COMPLETED ON BEHALF OF SCOTTISH BUILDING SOCIETY

We, Scottish Building Society, are willing to accept this CTF to JISA transfer in line with the Registered Contact's instructions above, as long as the following conditions are met:

We must receive all the transfer proceeds no later than:

For the purposes of the transfer of the CTF under the CTF/JISA regulations, the date shown below will be the transfer date.

Name of new JISA provider: Scottish Building Society