

To transfer your existing Junior Cash ISA 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 ISA provider to arrange the transfer. We will complete section G and send this form to your ISA provider.

SECTION A: EXISTING JUNIOR ISA PROVIDER

Type of Child Junior ISA Fund
with the existing provider

Cash

Stocks and Shares

Existing provider's name

Existing Junior ISA account number

Existing Junior ISA sort code

Existing Junior ISA roll number
(if applicable)

Address

Postcode

SECTION B: CUSTOMER DETAILS

I apply to transfer a Junior ISA for:

Child's Personal Details

Title

Forename(s)

Surname

Address

Postcode

Date of Birth

National Insurance
Number
(if the child is over 16)

Personal Details of Registered Contact

Title

Forename(s)

Surname

Address

Postcode

Date of Birth

National Insurance
Number

Phone Number

Please complete **EITHER** section C or D.

SECTION C: CASH JUNIOR ISA TRANSFERS ONLY

Have any subscriptions been made to the Cash Junior ISA in this tax year? Yes No

If Yes, please confirm the amount subscribed

A Junior Cash ISA holder can only hold one Junior Cash ISA at a time.
Please tick to confirm you agree to transfer the **full balance** of the Junior Cash ISA.

SECTION D: STOCKS AND SHARES JUNIOR ISA TRANSFERS ONLY

Please note the transfer will be undertaken subject to the terms and conditions applying to your Stocks and Shares Junior ISA, this may include certain fees or restrictions on transfers. You should check with the existing provider to understand the implications of a transfer.

Have any subscriptions been made to the Stocks and Shares Cash ISA in this tax year? Yes No

If Yes, please confirm the amount subscribed

£

Transfer the full balance of the account?

OR

Transfer part of the account balance?

Amount to transfer is

£

Partial transfer details

Please only complete this section if you are transferring part of the account balance. You do not do not need to complete this section if you are transferring the Stocks and Shares Junior ISA in full.

Do you want to transfer the current tax year Junior ISA subscription (this would involve selling any investments made with the subscription from the current tax year)? Yes No

Please note that the amount in the account representing current tax year subscriptions can only be transferred in whole and not in part.

If you only want to transfer the subscriptions from the current tax year, tick here

OR

If you only want to transfer all of the subscriptions from previous tax years, tick here

OR

If you only want to transfer part of the subscriptions from previous tax years (as well as investments relating to current year subscriptions) tick here and provide sale instructions by completing the details below.

Stocks, Shares and/or Funds that you wish to sell

Please check your selection is permitted by the existing Stocks and Shares Junior ISA provider prior to submitting this Transfer Authority form. Please note that you may be contacted by the existing Junior ISA provider to agree what to sell.

Please list all of the Stocks, Shares and/or Funds held with the above Junior ISA provider that you wish to sell and transfer the proceeds to the new Cash Junior ISA with Scottish Building Society.

Please use the box below to give instructions to the current Stocks and Shares Junior ISA provider with regard to what specific value or Tax Year(s) should be transferred and/or what investments should be realised to meet the transfer.

If needed, please list all investments held with the current Junior ISA provider that you wish to sell and transfer the proceeds to the new Junior Cash ISA with Scottish Building Society. Alternatively, you may provide this information by supplying a separate list, e.g. by annotating a valuation statement from the provider.

Description of investment	Investment indicator e.g. ISIN, Sedol, Cuip etc. (if known)	Number or value of stocks, shares, units or specify 'All' to sell the entire holding
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>

Uninvested cash to be transferred

If you want to transfer all of the uninvested cash balance, tick here

Please confirm how much of the uninvested cash balance in the Stocks and Shares Junior ISA you want to transfer

£

SECTION E: TRANSFER AUTHORITY

I authorise the current JISA provider to transfer the JISA detailed above to Scottish Building Society. I authorise the current JISA provider to provide Scottish Building Society with any information, written or non written, concerning the JISA and to accept any instructions from Scottish Building Society, relating to the JISA being transferred.

SIGNATURE

X

DATE

To be signed by the adult with parental responsibility named overleaf.

SECTION F: ISA DECLARATIONS

I declare that:

- I am 18 years of age or over;
- I have parental responsibility for the child;
- I am the registered contact for the Junior ISA;
- I agree to the Junior Cash ISA terms and conditions.

I authorise Scottish Building Society:

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

Declaration for Stocks and Shares Junior ISA transfers only:

Where I must give notice to close or transfer part of the existing Stocks and Shares Junior ISA, or the existing Stocks and Shares Junior ISA contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing Stocks and Shares Junior ISA provider to either:

Wait for the full notice period to end, or wait until redemption (whichever is relevant) before going ahead with the transfer

OR

Depending on the terms and conditions, carry out the transfer as soon as possible – I accept any consequential loss of income, capital and/or charges that may be applied

Before signing this form, please 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

X

DATE

SECTION G: TRANSFER ACCEPTANCE

TO BE COMPLETED ON BEHALF OF SCOTTISH BUILDING SOCIETY

I confirm that Scottish Building Society is willing to accept this ISA transfer in accordance with the instructions, provided that the transfer proceeds are made up of cash deposits only.

For the purposes of the transfer of the ISA wrapper under the ISA Regulations, the date of the transfer* will be:

Signed on behalf of Scottish Building Society

Signature

Date

Relationship
Centre Address

*The date of transfer is the date the form is accepted and authorised by Scottish Building Society and sent to the existing ISA provider.