

# Child Trust Fund to Junior ISA transfer form

This is an application form to transfer an existing Child Trust Fund (CTF) to a Junior ISA with AJ Bell. Please note that you must first open a Junior ISA online at [www.ajbell.co.uk](http://www.ajbell.co.uk) before you complete this transfer form. The whole CTF will be transferred to the Junior ISA and the CTF will then be closed. The AJ Bell ISA is a stocks and shares Junior ISA.

Only the registered contact of the CTF can complete and sign this transfer form. Please note that if anyone other than the registered contact signs this form, the transfer will be declined by the current CTF provider.

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

If you are considering transferring investments to us as part of this transfer, we recommend you contact your current CTF provider and ask if this is possible. If the CTF provider cannot transfer the investments, they may sell them and transfer as cash instead.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at [help@ajbell.co.uk](mailto:help@ajbell.co.uk).

When your transfer form is signed and completed, please scan and email it to [transfersin@ajbell.co.uk](mailto:transfersin@ajbell.co.uk).

Or if you prefer, you can post the completed form to us at:

AJ Bell  
4 Exchange Quay  
Salford Quays  
Manchester  
M5 3EE

If you email us your transfer form, we may later need you to post us a paper copy with a wet signature. If this is the case – and it'll depend on the provider you're transferring from – we'll be in touch to let you know.

## Registered contact's details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Permanent residential address

Postcode

Country

## Child's personal details

Title

Master / Miss / Other

Surname

Forename(s)

Date of birth

AJ Bell Junior ISA account number

Permanent residential address

Postcode

Country

Please ensure that the child's personal details held with the provider you're transferring from match the above as differing details may delay your transfer.

## Declaration

Only the registered contact of the CTF can complete and sign this transfer form.

I declare that

1. I have read, understood and retained a copy of the AJ Bell Junior ISA key features and terms and conditions.
2. I acknowledge that the details contained therein and this application form, constitute the agreement between me and AJ Bell Securities Limited.
3. On my written request AJ Bell Securities Limited will allow me to withdraw on the terms laid down in the terms and conditions.
4. I understand and accept that AJ Bell Securities Limited accepts no responsibility for any losses incurred as a result of any delays in the transfer to the AJ Bell Junior ISA.
5. The declaration and information contained in this form is correct to the best of my knowledge and belief and I undertake to notify AJ Bell Securities Limited of any changes without delay.

**Please note that if anyone other than the registered contact signs this form, the transfer will be declined by the current CTF provider.**

Registered contact's name

Date

Registered contact's signature

## CTF transfer authority

The following stakeholder CTF features are not included in the AJ Bell Junior ISA.

- Lifestyling from age 15
- Minimum subscriptions 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.

I apply to transfer a CTF to an AJ Bell Junior ISA.

CTF unique reference number

Approximate transfer value

CTF provider's name

Does the CTF only hold cash?

☐

Yes

☐

No (please tick one option only)

If no, please transfer any investments held as

☐

Investments

☐

Cash (please tick one option only)

### IMPORTANT NOTE

You may hold funds with your current provider in a unit class not available with AJ Bell. If so, when you transfer these funds to us, you authorise us to convert them into a mutually held unit class – which could be more expensive. After the transfer is complete, you also give us the authority to convert any of your funds to a cheaper unit class, where one is available.

I authorise AJ Bell Securities Limited

- to hold the child's subscriptions, investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- to make on behalf of the child any claims to relief from tax in respect of Junior ISA investments.

I confirm that I have not received any advice or recommendation in relation to the transfer from a representative of AJ Bell or AJ Bell Securities Limited.

**I declare that I am the registered contact for the CTF.**

Registered contact's name

Date

Registered contact's signature

## Assets to be transferred

If you ticked 'Investments', then please complete the table below with the assets to be transferred along with the approximate cash value.

Please note that any rebates payable to your child in respect of investments being transferred will be paid in the form of units following the transfer to AJ Bell.

If the table is not completed in full the transfer of assets may be delayed.

Assets name/description	SEDOL/ISIN	Units

Please continue on a separate sheet if necessary.

## IMPORTANT

You should contact your current CTF provider and seek confirmation that the investments listed above can be transferred as investments. AJ Bell cannot be held responsible if the CTF provider sells the investments to transfer as cash.