

# Child Trust Fund and Junior ISA transfer authority form

NS  
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➤ Please complete this form if you want to transfer a Child Trust Fund or a Junior ISA with another provider to an NS&I Junior ISA. You must be the registered contact for the account you want to transfer.

➤ If you are a parent or guardian wanting to make this transfer on behalf of your child, you must sign.

If you are a child aged 16 or 17 wanting to make this transfer on your own behalf, you must sign.

➤ Please write in **BLACK CAPITAL LETTERS** inside the boxes. Make sure you complete all the sections that apply to you and sign and date it at the end.

The following stakeholder Child Trust Fund features are not included in the NS&I Junior ISA:

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

The minimum subscription for the NS&I Junior ISA is £1 and there are no annual charges.

If you are applying to transfer a stakeholder Child Trust Fund, tick this box to confirm that you understand this and want to go ahead. ☐

If the transfer from the Child Trust Fund is not successful, the NS&I Junior ISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to it will be returned. The Child Trust Fund will remain intact.

## 1 Your details

Please complete in full.

The address you provide must be your permanent address.

title	<input type="text"/>	date of birth (DD MM YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
surname	<input type="text"/>						
forenames in full	<input type="text"/>						
address	<input type="text"/>						
	<input type="text"/>						
postcode	<input type="text"/>	country	<input type="text"/>				
phone number	<input type="text"/>	Preferably a mobile so we can reach you more easily.					

## 2 Child's details

Please complete in full.

The address you provide must be their permanent address.

title	<input type="text"/>	date of birth (DD MM YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
surname	<input type="text"/>						
forenames in full	<input type="text"/>						
address	<input type="text"/>						
	<input type="text"/>						
postcode	<input type="text"/>	country	<input type="text"/>				
nationality	<input type="text"/>						
National Insurance number	<input type="text"/>	If the child is aged 16 or 17 and is transferring a Junior ISA					
email address (essential)	<input type="text"/>						

## 3a Information about the Child Trust Fund you want to transfer

(only complete this section if transferring in from a Child Trust Fund)

Please give the details of the Child Trust Fund you want to transfer to an NS&I Junior ISA.

name of existing Child Trust Fund provider	<input type="text"/>
child's unique Child Trust Fund reference number (format AB123456C)	<input type="text"/>

Please complete the next page ►

### 3b Information about the Junior ISA you want to transfer

Please give the details of the Junior ISA you want to transfer to an NS&I Junior ISA.

(only complete this section if transferring in from a Junior ISA)

name of existing Junior ISA provider	<input type="text"/>																								
account number	<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	sort code	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>
bank reference or building society roll no (if applicable)	<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"/>	<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"/>	<input type="text"/>

Is the existing ISA a cash or stocks and shares ISA?

cash ☐ stocks and shares ☐

Please note:

We only accept the full transfer of another Junior ISA to an NS&I Junior ISA. The ISA Regulations do not allow only part of a cash Junior ISA to be transferred to another cash Junior ISA. We do not allow partial transfers from a stocks and shares Junior ISA.

Have any subscriptions been made to this Junior ISA in the current tax year?

yes ☐ total subscriptions made in current tax year £  p  
no ☐

### 4 Declarations

- I am aged 16 or over.
- I have parental responsibility for the child named on this form **or** I am the child named above
- I am the registered contact for this Child Trust Fund/Junior ISA

I authorise NS&I to:

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

### 5 Transfer authority

Please tick only one box and sign.

I authorise the existing Child Trust Fund/Junior ISA provider to transfer the Child Trust Fund/Junior ISA detailed above to NS&I. I authorise the existing Child Trust Fund/Junior ISA provider to provide NS&I with any information about the Child Trust Fund/Junior ISA and to accept any instructions from them relating to the Child Trust Fund/Junior ISA being transferred.

Where I must give notice to close or transfer the existing Child Trust Fund/Junior ISA, or the existing Child Trust Fund/Junior ISA contains a fixed-term deposit that has not reached its maturity date, I instruct the existing Child Trust Fund/Junior ISA provider to either:  
(please tick the appropriate box)

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

OR

☐ depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any loss of interest or charges which may be applied.

### 6 Signature of registered contact

I apply to transfer the Child Trust Fund/Junior ISA noted on this form for the child named on this form to an NS&I Junior ISA. I acknowledge that the child will be the beneficial owner of the NS&I Junior ISA. I agree to the NS&I Junior ISA customer agreement dated 1 July 2024.

signature

date (DD MM YYYY)

<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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Your marketing preferences

We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

by post ☐ by phone ☐ by email ☐ online ☐

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

### For NS&I use only

We will complete this section.

We are willing to accept this transfer in line with the customer's instructions above, as long as the following conditions are met:

- The transfer proceeds are made up of cash deposits only
- We must receive the the transfer proceeds no later than

date

For the purposes of the transfer under the ISA regulations, the date shown below will be the transfer date.

date

NS&I