



Transfer your CTF or Junior Individual Savings Account to Beanstalk

WHAT TO DO WITH THIS DOCUMENT

This is a written instruction to your current provider to transfer your CTF or JISA to KidSave. Please print this form, fill it in carefully, then sign it. Finally, just put it in an envelope clearly addressed to **Freepost KIDSTART**. You won't need a stamp or any other details.

Or if you prefer, cut off the address label on the last page, stick it onto your envelope, and mail it to us with the completed form.

We're sorry, but this process does require paper. We'll check your form and get back to you if we need to verify anything.

Note: your current CTF or JISA provider will only accept instructions from the Registered Contact for your child's investment account. Please check that you are the Registered Contact before you send us your completed form.

YOUR DETAILS

Title

Full Name

Address

Postcode

I apply to transfer the CTF / JISA for

MY CHILD

Child's full name

Child's address
(if different from above)

Date of birth

Child's NI Number (if known)

CURRENT CTF or JISA DETAILS

Type of Investment
(select one)

☐ Child Trust Fund, ☐ Cash JISA, or ☐ Stocks & Shares JISA

Current provider's name
and address

Account number / ref.

The investment will be transferred into a Stocks & Shares JISA. Please transfer the full balance of the account.

DECLARATION & SIGNATURE

I declare that:

- I am 16 years of age or over;
- I am the child or I have parental responsibility for the child;
- I am the Registered Contact for the CTF / JISA.

I authorise KidStart Limited:

- to hold the child's subscriptions, JISA 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 JISA investments.

Signed:

Date: