

**APPENDIX 2A - JUNIOR ISA TRANSFER AUTHORITY**

This transfer authority must be completed by the registered contact for the Junior ISA (JISA) or Child Trust Fund (CTF) account.

**Applicant (Parent/Guardian)**

**Full Name**

**Address**

**Post Code**

**Date of Birth**

**Child**

(if different from Applicant)

(if 16 or over and one is available)

**National Insurance (NI) Number**

NI number should be available from a NI card, payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP or pension order book

**Existing JISA or CTF Manager**

**Name**

**Address**

**Postcode**

**Existing JISA or CTF Manager**

**Account Number / CTF Unique Reference**

**Type of Junior ISA**

I declare that I am the registered contact for the following JISA / CTF and I am authorised to conduct the transfer.

Please tick one of the following:

- I hereby authorise you to **LIQUIDATE** the above JISA / CTF and transfer the cash proceeds to R.C. Brown Investment Management PLC (RCBIM).
- I hereby authorise you to transfer the above JISA / CTF **IN SPECIE** to R.C. Brown Investment Management PLC (RCBIM). Should the transferring agent not allow transfers in specie, I agree to the transfer proceeding **IN CASH**.
- I hereby authorise you to transfer the above Cash **JISA** to R.C. Brown Investment Management PLC (RCBIM).

## APPENDIX 2A - JUNIOR ISA TRANSFER AUTHORITY

I confirm that I wish to transfer the JISA / CTF detailed above to R.C. Brown Investment Management PLC (RCBIM) and authorise you to:

- Comply with all instructions given to you by RCBIM regarding the transfer of cash and/or investments.
- Liaise with RCBIM, whom I have already informed of this transfer request, and send RCBIM a closing statement.
- Provide RCBIM with the information required under HMRC ISA Regulations, within the timescale stated in the Regulations.
- Forward all outstanding dividends and tax credits to RCBIM with full supporting details.

The JISA / CTF will be transferred into an R.C. Brown Investment Management Stocks & Shares JISA. RCBIM will only accept a full transfer. For Child Trust Fund transfers, if the transfer 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.

- I declare that:
- I am 16 years of age or over.
- I have parental responsibility for the child / I am the child (delete as applicable).
- I will be the registered contact for the JISA.

I authorise R.C. Brown Investment Management PLC (RCBIM) 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 the child's behalf any claims to relief from tax in respect of JISA investments.

### Signature

(Applicant, or child if 16 or over and applying for themselves)

### Dated

### Head Office:

1 The Square, Temple Quay, Bristol BS1 6DG

**tel:** 0117 925 6073

**fax:** 0117 925 3790    **email:** [enquiries@rcbim.co.uk](mailto:enquiries@rcbim.co.uk)    **www.rcbim.co.uk**