

Example of a written external transfer application

Applicant's title (if any).....

Full name

Applicant's address

Post Code

I apply to transfer a JISA for

Child's title (if any)

Full name

Child's address

..... Post Code.....

Child's date of birth

Child's NINO (if they have one)

Current JISA provider

Type of JISA with the current provider (cash or stocks and shares)

Type of JISA you want to transfer into (cash or stocks and shares)

Tick one box

Transfer the full balance of the account

Transfer part of the account balance
(which must be to a JISA of the other type)

Amount to transfer is

If you are requesting a part transfer, amount of current year subscriptions to be included in the transfer

(enter 'All' or specify an amount)

I declare that

- I am 16 years of age or over
- I am the child /I have parental responsibility for that child (delete which does not apply)
- I am the registered contact for the JISA

I authorise [provider's name]

- 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