

Example of written transfer authority

Information about you

Title:

First names:

Surname:

Permanent home address:

Postcode:

Contact phone number (including area code):

Information about the child

Title:

First names:

Surname:

Child's date of birth:

Child's National Insurance number:
(if they have one)

Permanent home address:

Postcode:

Information about the JISA you want to transfer

Name of existing JISA provider:

Sort code:

Account Number:

Roll number (if applicable)

Please note

The ISA Regulations do not allow only part of a Cash JISA to be transferred to another Cash JISA.
(Therefore all Cash ISA to Cash ISA transfers must be made in full.)

1 Have any subscriptions been made to this Cash JISA in the current tax year?

Yes Total subscriptions made in current tax year £

No

Application and Declarations

I apply to transfer a Cash JISA for the above named child as detailed above.

I declare that

- I am 16 years of age or over

- I have parental responsibility for the above named child **or**
I am the above named child
- I am the registered contact for this Cash JISA

Transfer authority

I authorise the existing JISA provider to transfer the JISA (account number above) to [new JISA Provider]. I authorise the existing JISA provider to provide [new JISA Provider] with any information, about the Cash JISA and to accept any instructions from them relating to the Cash JISA being transferred.

Where I must give notice to close or transfer the existing Cash JISA, or the existing Cash JISA contains a fixed-term deposit that has not reached its maturity date, I instruct the existing JISA provider to either: (tick the appropriate box)

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

or

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

Signed: Date:

Transfer acceptance (your new JISA provider fills this part in)

We are willing to accept this JISA 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 transfer proceeds no later than .

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

Date:

Name of new provider: