

External transfer telephone applications

What is your name?
(Forename, middle initials, and surname)

What is your address?
(including postcode)

What is the child's name?
(Forename, middle initials, and surname)

What is the child's address?
(including postcode)

What is the child's date of birth?
(Day/Month/Year)

What is the child's NINO (if they have one)?

What type of JISA do you want to transfer (cash or stocks and shares)?

What type of JISA do you want to transfer into, cash or stocks and shares?

Details of your current JISA provider?

Do you declare that

You are aged 16 years or older?

You have parental responsibility for the child/are the child?

You are the registered contact for the JISA?

By applying to open a JISA you authorise us to carry out certain functions on your and the child's behalf, and to make a written copy of your application. Details of this will be sent to you, with the terms and conditions of this JISA.

I will now read back the application and declaration to you – if you agree that they are correct I can transfer the JISA from your current provider (after any withdrawal period).