

JISA transfer history form

Name of new provider

Personal details of the child

Child's title (if any), and full name

Child's address
..... Postcode

Date of birth:

NINO (if they have one):
.....

JISA details

Account number (of old provider)

Type of JISA (cash or stocks and shares)
.....

Date of transfer:

Total subscriptions in tax year to date of transfer: £.....

Date of first subscriptions in tax year of transfer* (see below)
.....

Details of any investment income to follow £.....

Details of investments transferred

The 'Date of first subscription' is only to be completed if the JISA is opened in the tax year in which the transfer takes place. If the transfer takes place in a later year the field must be left blank.