

Part C

Only complete **Part C** if a 'one off' immediate payment or the setting up of a regular payment is required from the fund. You must state how much you require and why you need it. It is for the judge to approve or reject any such requests at the investment hearing.

Subsequent payments or regular payments can only be made through an **application to the court** (not the Court Funds Office). If you do not require an immediate payment or wish to set up a regular payment, please go to **Part D**.

One off payment - please provide your bank details below

Amount required

£

This payment is required for

evidence of costs may be required

Regular payment - please provide your bank details below

Amount required

£

This payment is required for

evidence of costs may be required

To be paid

Monthly Every 6 months

Quarterly Annually

Please state the **day of the month** that money should reach your account (ie. 21st).

day of the month

Bank details - only complete when a payment is requested

Name of bank

Address

Postcode

Account name

Account no.

Sort code

Please provide a copy bank statement or letter from your bank dated within the last three months confirming the bank details provided on this form.

Part D

Only complete **Part D** if you are representing a protected beneficiary and:

- The award is £10,000 or more but less than £100,000, or where the Court of Protection has directed that the fund be retained and
- The award is likely to remain in court for five years or more.

Please read the accompanying factsheet before completing this section.

The percentage of the fund invested in the Equity Index Tracker Fund will depend on whether income is likely to be required from the fund.

Is the award of £10,000 or more and likely to remain in court for five years or more?

Yes No If No, please go to Part E

When managing the investment: (tick only **one** box)

<input type="checkbox"/> I would like up to 65% of the fund invested in the Equity Index Tracker Fund. The remainder should be held on the special account earning interest only. I will not require access to the fund for the next 10 years.	ONE
<input type="checkbox"/> I would like 50% of the award invested in the Equity Index Tracker Fund. I may require access to the fund within 5 to 10 years.	TWO
<input type="checkbox"/> There will be a regular requirement to access the fund as detailed in Part C of this form.	THREE
<input type="checkbox"/> I would like all the money to be placed in the special account.	FOUR

Statement: I understand that as a result of the judicial decision, some of the fund may be invested in the Equity Index Tracker Fund and I am content for this to happen.

Yes No

If No, please give reasons

Note: Ticking the 'No' box does not guarantee the money will not be invested – the information provided is to help the judge make a decision. The final decision rests with the judge.

Part E

Name of litigation friend

Signature

Date

To be completed by the judge

Section 1 — May be completed by court staff

Full case title

Claimant

Defendant

Claim number

In attendance at the hearing

Current funds in court

£ :

Total to be invested

£ :

Section 2 — Only to be completed by the judge

Full name of protected beneficiary

Protected beneficiary's date of birth

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Section 3 — Only to be completed by the judge

One off/regular payments – please refer to Part C

One off payment of

£ :

Regular payment of

£ :

To be paid

Monthly Every 6 months

Quarterly Annually

Please state the **day of the month** that money should reach the account.

day of the month

Has a copy bank statement/letter been provided?

Yes No

Section 4 — Only to be completed by the judge

Investment instructions – please refer to Part D

Money may only be invested in the EITF where the protected beneficiary has between £10,000 and £99,999.99 held in court or where the sum is greater but the Court of Protection has directed that the fund be retained and invested in the same way as the fund of a child and the money is likely to be invested for five years or more.

Investment policy

- | | |
|---|--------------|
| <input type="checkbox"/> Capital growth | ONE |
| <input type="checkbox"/> Capital growth and income | TWO |
| <input type="checkbox"/> Maximum income | THREE |
| <input type="checkbox"/> Place all funds on special | FOUR |

Interest directions

- Re-invest in special account
 Pay litigation friend
 Re-invest in the Equity Index Tracker Fund

Dividend directions (if investment in the Equity Index Tracker Fund)

- Re-invest in special account
 Pay litigation friend
 Re-invest in the Equity Index Tracker Fund

Only to be used if the policy differs from the framework above.

Signature

Name of judge

Date

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