Management of a protected beneficiary's fund (where the award is £10,000 or more but less than £100,000, or where the Cou

CFO 320PB

The litigation friend should complete only Parts A to E, where applicable, before the hearing and bring the form to the hearing.

Part A	Part B
Full case title Claimant	You should ensure that the information requested in Part B is completed accurately. The Court Funds Office will use the details provided to set up the protected beneficiary's account.
Defendant	
Name of the court where the hearing is to be held	Full name of protected beneficiary
Claim number	Protected beneficiary's date of birth
What is the date of the investment hearing?	Full name of litigation friend
That is the date of the infestion realing.	
Have you read the fact sheet that accompanies this form?	Address
Yes No	
Does a legal aid charge apply?	
Yes No	
If Yes, please enter your legal aid reference below	
	Postcode
Litigation friend solicitors' details	Contact telephone number
Name	
	E-mail address
Address	
	Address of protected beneficiary if different to that of litigation friend
Postcode	
Solicitors reference	
	Postcode Postcode

How to contact the Court Funds Office

Customer Helpline

0300 0200 199

Email

enquiries@cfo.gov.uk

Address

Court Funds Office Court Funds Office Sunderland DX 328004 SR43 3AB Sunderland 19

For full details of how your information is used please see our privacy notice at https://www.gov.uk/government/collections/court-funds-office-forms or contact CFO who will provide you with a copy.

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**.

£	
This payment is r	equired for
	evidence of costs may be requ
Regular payme	nt - please provide your bank details below
Amount required	
£	
This payment is r	equired for
	evidence of costs may be requ
To be paid	evidence of costs may be requ
	France Consents
Monthly	Every 6 months
Quarterly	Annually
Dlasca stata tha	day of the month that money should reach your acco
(ie. 21 st).	lay of the month that money should leach your acco
, ,	day of the month
	day of the month
Bank details - o	only complete when a payment is requested
Name of bank	
Address	
Addiess	
	Postcode
Account name	
Account name	
Account name Account no.	
_	

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 If No, please go to Part E	
When managing the investment: (tick only one box)	
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
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
There will be a regular requirement to access the fund as detailed in Part C of this form.	THREE
I would like all the money to be placed in the special account.	FOUR
fund may be invested in the Equity Index Tracker Fund and I am content for to happen. Yes No	
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 to happen. Yes No If No, please give reasons	
fund may be invested in the Equity Index Tracker Fund and I am content for to happen. Yes No	thi:
fund may be invested in the Equity Index Tracker Fund and I am content for 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 deci	thi:
fund may be invested in the Equity Index Tracker Fund and I am content for 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 decirests with the judge.	thi:
fund may be invested in the Equity Index Tracker Fund and I am content for 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 decirests with the judge. Part E Part E	this

To be completed by the judge

Section 4 — Only to be completed by the judge **Section 1** — May be completed by court staff **Full case title** Investment instructions – please refer to Part D Claimant 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 Defendant the same way as the fund of a child and the money is likely to be invested for five years or more. **Investment policy** Claim number Capital growth ONE Capital growth and income TW₀ In attendance at the hearing Maximum income **THREE** Place all funds on special **FOUR Interest directions** Re-invest in special account Pay litigation friend Current funds in court Re-invest in the Equity Index Tracker Fund £ **Dividend directions** (if investment in the Equity Index Tracker Fund) Total to be invested Re-invest in special account £ Pay litigation friend **Section 2** — Only to be completed by the judge Re-invest in the Equity Index Tracker Fund Full name of protected beneficiary Only to be used if the policy differs from the framework above. Protected beneficiary's date of birth **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 £ Signature To be paid Every 6 months Monthly Quarterly **Annually** Name of judge Please state the **day of the month** that money should reach the account. day of the month Date Has a copy bank statement/letter been provided? Yes No