

CTF TRANSFER FORM

I wish to transfer to a Pilling non-stakeholder CTF or a Pilling stakeholder CTF

Details of the person with parental responsibility for the child

Title First Names (in full)

Surname

Permanent Residential Address
Postcode

Date of Birth NINO E-Mail

Tel:- Daytime Tel:- Mobile

I apply to transfer a CTF for :-

Child's title First Names

Child's Surname

Child's Permanent Residential Address
Postcode

Child's Date of Birth Child's NINO (if applicable)

Child's unique reference number (as on voucher) if known

Current CTF providers details: - Name

Address
Postcode
Telephone number Account Number

(tick one box only)

Please transfer the above CTF immediately in its current form to Pilling & Co **OR**

Please liquidate the above CTF immediately and transfer the cash to Pilling & Co

Please deduct any charges for this service from the cash in the CTF

I declare that

- I am 16 years of age or over.
- I have parental responsibility for the child.
- I will be the registered contact for the CTF.
- I authorise Pilling & Co to hold the child's Inland Revenue contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and to make on the child's behalf any claims to relief from tax in respect of CTF investments.
- I agree to the CTF terms and conditions.
- I agree to Pilling & Co's Terms & Conditions for this plan as set out in the "Introductory Guide" (enclosed or available on request) and that they may alter to comply with changes to CTF regulations.

Signed

Date

PLEASE NOTE :- For us to accept instructions on this account from someone other than the registered contact (eg. Spouse, partner etc.) please enclose a signed letter of authority with this form.

Only complete the box below if you are opening a non-stakeholder CTF.

Details of the funds you wish to invest in: - * see note below		
STOCK	No of Shares	or Amount of Money
<input type="text"/>	<input type="text"/>	<input type="text" value="£"/>

Important note

You have a responsibility when choosing investments for a non stakeholder CTF to ensure your selection has a suitable risk profile for the child. High risk investments may not be purchased for a CTF. We will use our best endeavours to inform you if we believe your investment choice is high risk. We reserve the right to refuse to carry out investment instructions if we believe them to be unsuitable. However, we accept no responsibility if high risk investments are purchased.

*

Taking the size of a CTF investment into account, you should be aware that if you elect for a non-stakeholder CTF and split the funds into more than one investment, the minimum commission charges and on going custody fees could negate any income or increase in value and affect the overall performance of the CTF. As an alternative, you may wish to consider our stakeholder CTF which is invested in a fund that gives a good spread of investments.

The value of investments may fall as well as rise and you might not get back all of your original investment.