

Junior ISA Transfer Request

PILLING & Co

INSTRUCTIONS

Please complete this form using BLOCK CAPITALS in black ink, sign and date, and post the original form to us at: **Pilling & Co Stockbrokers, Henry Pilling House, Booth Street, M2 4AF.**

Please note if you are a new Pilling & Co JISA client you will also need to complete our JISA Application Form.

APPLICANT DETAILS

Title First Name(s) (in full)
Surname Existing Pilling Account Number
Date of Birth / / National Insurance Number
Permanent Residential Address
..... Postcode
Primary Telephone Secondary Telephone

CHILD'S DETAILS

Title First Name(s) (in full)
Surname National Insurance Number (if applicable)
Date of Birth / /
Permanent Residential Address
..... Postcode
Primary Telephone Secondary Telephone

TRANSFER FROM EXISTING MANAGER

I apply to transfer my existing JISA to Pilling & Co from:

Existing Manager Account Number
Address
..... Postcode
Email and/or Phone

If you have subscribed to this JISA in the current tax year, please specify: £.....

TO THE EXISTING JISA MANAGER

Please deduct any charges for this service from the cash in my JISA (*tick one box only*):

- ☐ Please transfer my full JISA immediately in-specie, including cash, to Pilling & Co.
- ☐ Please liquidate my full JISA immediately and transfer the cash to Pilling & Co.
- ☐ My JISA is held all in cash, please transfer this immediately to Pilling & Co.

DECLARATIONS

I declare that:

- ✓ I am 16 years of age or over.
- ✓ I am either the child or I have responsibility for the child.
- ✓ The child does not have a Child Trust Fund (CTF) Account.
- ✓ I will be the registered contact for this JISA.
- ✓ The child is resident in the UK, or is a UK Crown servant or is a dependant of a UK Crown servant.
- ✓ All subscriptions made now or in the future to this JISA belong to the child.
- ✓ The child has not and will not subscribe to another JISA of this type.
- ✓ The child does not have another JISA of this type.
- ✓ The child has not had any subscriptions that will result in this child exceeding the annual limit.
- ✓ That subscriptions will not be made to a JISA for this child that will result in the subscription limit being exceeded.
- ✓ I understand that on the child's 18th birthday, this JISA will automatically become an ISA and will attract the charges associated with a Pilling ISA.
- ✓ To the best of my belief the detail in this form is correct, and I will inform Pilling & Co of any change that may affect this information
- ✓ I agree to Pilling & Co's Terms & Conditions for this JISA as set out in the "JISA Brochure" (enclosed or available on request) and General Terms & Conditions and that they may alter to comply with changes to JISA regulations.

AUTHORISATIONS

I authorise Pilling & Co Stockbrokers Ltd:

- ✓ To hold my cash subscriptions, JISA investments, interest, dividends, and any other rights or proceeds from those investments and any other cash. I also understand that if I were to have overseas investments, my assets may be deposited in non-UK jurisdictions where my rights and protections may be reduced.
- ✓ To make any claims for me to relief from tax in respect of JISA investments.
- ✓ On my written request and within a time frame stipulated by me (not less than 30 days) to transfer (full or part), or pay to me, JISA investments, interest, dividends, rights or other proceeds from such investments or any cash.
- ✓ To hold my JISA investments in CREST, where possible, in the name of St Anns Square Nominees Limited.

PLEASE SIGN HERE

Name Signature Date / /



Pilling & Co Stockbrokers Ltd. is Authorised & Regulated by the Financial Conduct Authority No. 652114
Members of The London Stock Exchange | Registered in England and Wales No. 9220456
Registered Address: Henry Pilling House, Booth Street, Manchester, M2 4AF, United Kingdom
T: 0161-832-6581 | F: 0161-832-0815 | info@pilling.co.uk | www.pilling.co.uk