

# Pilling & Co Stocks & Shares JISA

# Transfer Form

I wish to transfer to an Execution Only JISA

**or**

a Managed JISA

Title  First Names (in full)

Surname

Permanent Residential Address

Postcode

Tel:- Daytime

Mobile

E-Mail

Date of Birth

NINO

**I apply to transfer a Junior ISA (JISA) for :-**

Child's title  First Names

Child's Surname

Permanent Residential Address (if different to above)

Postcode

Child's Date of Birth

Child's NINO (if applicable)

**Current JISA providers details: -**

Name

Address

**(tick one box only)**

Please transfer the above Cash JISA in full or £  as a partial transfer to Pilling & Co **OR**

Please transfer the above Stocks & shares JISA immediately in its current form to Pilling & Co **OR**

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

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

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.

# JISA Transfer Form

I DECLARE THAT :-

- I am 16 years of age or over.
- I am the child/ I have parental responsibility for that child. **(delete as appropriate)**
- I/ the child does not have a Child Trust Fund (CTF) Account.
- I will be the registered contact for the JISA.
- The child is resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a civil relationship with a UK Crown servant.
- I have not subscribed and will not subscribe to another JISA of this type for this child.
- I am not aware that this child has another JISA of this type.
- I am not aware of other subscriptions that will result in this child exceeding the annual limit
- I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded.
- I authorise Pilling & Co to hold the child's subscriptions, JISA 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 JISA investments.
- I agree to JISA and Pilling & Co's Terms & Conditions and confirm that to the best of my belief the information on this form is true.
- I understand that on my 18th birthday, without reference to the child/me, the JISA will automatically become an ISA and will attract the charges associated with a Pilling ISA.

SIGNED

DATE

**Please note:-** If you have selected our Managed JISA the funds will automatically be invested upon receipt from the previous manager. However, if you have selected our Execution Only JISA, we will write to you when the funds are received from the previous manager. Once you have received this confirmation you can give us your investment instructions.

## For Execution Only JISAs only

Dividends (please tick)
I wish to elect for the "DRIP" scheme <input type="checkbox"/> (please see details in the brochure)

Please return this form to: -

Pilling & Co. Henry Pilling House, 29 Booth Street, Manchester. M2 4AF