Foresters Financial

Child Trust Fund (CTF) to Junior ISA Transfer Application Form

Please return your completed form using one of the options below:

1. Email a photo or scanned copy from the email address registered to your account (the one you use for MyPlans)
2. Upload a photo or scanned copy via MyPlans: Help - Raise a query - select 'Other - Document upload'
3. Post it to FREEPOST Foresters Financial, Foresters House, 2 Cromwell Avenue, Bromley BR2 9BF (no stamp required)

Please note: as part of our verification process, we may need to carry out additional checks.

Forester Life does not give advice on transfers. If you are in any doubt about this transfer you should seek full advice. The value of the Plan may fluctuate as the value of the investments in the fund can go down as well as up and you may get back less than has been invested. If you are transferring from a Cash Child Trust Fund you should note that there will be risk to the capital.

1. Applicant's Details

Title and Forename(s)

Surname

Date of Birth D D M M Y Y Y Y

Gender ☐ Male ☐ Female

Address (permanent residence)

Postcode

2. Child's Details (if different from the above)

Title are Forename(s)

Surname

Date of Birth D D M M Y Y Y Y

Gender ☐ Male ☐ Female

Address (permanent residence)

Postcode

Unique Reference No. (URN)

3. Your Contact Details

Telephone number (in the event of queries)

Email address

Enjoy the convenience of going paperless!

You will be set up to receive documents by email, if you have a MyPlans account you can view them online.

I want to opt out of the eco-friendly email option and receive documents by post: ☐

Stay connected with tailored updates

We may contact you about our products and services. **Tick the boxes below to opt-in**, you can opt-out anytime.

☐ Email ☐ SMS (text)

Please turn over >

3. CTF transfer details

I apply to transfer the above child's existing CTF - Account No.

From (old CTF manager) to (new Junior ISA manager) **Forester Life**

Address

Postcode

4. Funds

Please choose which fund(s) you would like to invest in, and the amount (%). If you would like to transfer into the Shariah Junior ISA then 100% of the fund will be invested in the Foresters (Schroders) Managed Islamic Global Fund.

You should read the relevant Key Information Document(s) and Brochure before selecting your choice of fund(s).

Foresters Stakeholder (Schroders) Managed Fund %

Foresters Stakeholder (Schroders) Sustainable Future Managed Fund %

OR

Foresters (Schroders) Managed Islamic Global Fund 100%

5. Using your personal information

We will use the data you provide to administer your Plan. For more information on the data we collect, why we collect it, how we use it for processing purposes and how we store your information, please visit **foresters.com/UKprivacy**

6. Declaration and Transfer Authority

I declare that:

- I am 16 years of age or over;
- I am the child or I have parental responsibility for that child;
- I am the Registered Contact for the CTF and will be the Registered Contact for the Junior ISA; and
- the information provided by me in making this application is true and complete and to the best of my knowledge and belief.

I authorise Forester Life Limited:

- to hold the child's subscriptions, any other rights of proceeds in respect of those investments and any other cash;
- to make on behalf of the child any claims to relief from tax in respect of Junior ISA investments; and
- to use the child's and my personal information for the purpose set out under 'Using your Personal Information' section.

I am aware that:

- a printed copy of the answers given in my application and a specimen Plan Document is available on request;
- the child named in this application will be the beneficial owner of the Plan and any contribution is a gift to the child and cannot be reclaimed by me and any gifter; and
- if the transfer from the CTF is not successful, any Junior ISA that has been opened on a provisional basis to accept the transfer will be invalid, and any subscriptions to the provisional Junior ISA will be returned. The CTF will remain intact.

I agree to the Junior ISA Terms and Conditions. These may be provided by my Forester Life Financial Adviser or by contacting Customer Services and are included in my Plan Documents.

I confirm that:

- I have received the Junior ISA brochure and Key Information Document(s);
- I have read the notice regarding use of personal information;
- I have not received any financial advice from a Forester Life Financial Adviser in respect to this transfer; and
- I have read this Declaration in full and wish for this transfer application to proceed.

Signature of applicant

Date