

Forester Life Child Trust Fund (CTF) - Transfer Application

Simply complete the below Child Trust Fund Transfer Application Form in BLOCK CAPITALS and black ink. It is very important to read the information, answer all questions and sign the 'Declaration and Transfer Authority' section. Please return to Freepost Foresters Financial, Foresters House, 2 Cromwell Avenue, Bromley BR2 9BF.

Please note 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 now be some risk to the capital.

1. Applicant's details

Title Mr / Mrs / Miss / Other	<input type="text"/>	Address (permanent residence)	<input type="text"/>
Forename(s)	<input type="text"/>		<input type="text"/>
Surname	<input type="text"/>	Postcode	<input type="text"/>
Tel. No. (in the event of queries)	<input type="text"/>	Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Gender	Male <input type="checkbox"/> Female <input type="checkbox"/> Prefer not to say <input type="checkbox"/>	Email address	<input type="text"/>

2. Child's details (If different from applicant's details)

Title	<input type="text"/>	Address (permanent residence)	<input type="text"/>
Forename(s)	<input type="text"/>		<input type="text"/>
Surname	<input type="text"/>		<input type="text"/>
Gender	Male <input type="checkbox"/> Female <input type="checkbox"/> Prefer not to say <input type="checkbox"/>	Postcode	<input type="text"/>
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Child's Unique Reference No.	<input type="text"/>
Nationality	<input type="text"/>		

3. Current CTF details

Please note that the Forester Life CTF is a Stakeholder account.

Name of CTF provider	<input type="text"/>	Account No.	<input type="text"/>
Address	<input type="text"/>		
	Postcode	<input type="text"/>	

4. Fund allocation

Please choose which fund(s) you would like to invest in, and the amount (%).

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

Foresters Stakeholder (Schroders) Managed Fund	<input type="text"/>	%
Foresters Stakeholder (Schroders) Sustainable Future Managed Fund	<input type="text"/>	%

Please turn over for sections 5 & 6 >

5. Using your Personal Information

We are committed to ensuring your privacy and personal information is protected. This notice explains the information we may hold, how we obtain it and for what purposes, who we share it with and why, and the rights you have in respect to your information. This is further explained in more detail in our Privacy Policy.

We are Forester Life Limited (Forester Life), a company registered in England under company number 2997655. Our registered office is at Foresters House, 2 Cromwell Avenue, Bromley, BR2 9BF. We are a registered Data Controller and our Data Protection Officer can be contacted by email at data.protection@foresters.co.uk or at the above address.

Personal information is information that identifies you and the child, is about you and the child and is provided through your dealings with us. It includes your names, addresses, contact details, dates of birth and Forester Life Plan details. In addition we hold information that we use to manage our relationship with you (contact, complaints and financial information) and information about how you interact with our website. In certain circumstances we may request and receive sensitive personal information about you and the child.

The information you provide to Forester Life will be used for setting up and administering Forester Life Plans, for communicating with and keeping customers informed and for maintaining a record of complaints. In addition it will also be used for research and analysis, for marketing of our products and services and for compliance monitoring and crime prevention.

We share the information with our service providers, identity verification services such as credit reference agencies, and other parts of the Foresters organisation. We will not disclose

any of the information to any other body or organisation except to prevent crime or if required by regulations or any law enforcement organisation.

We will retain the information for as long as the child is a Forester Life Planholder, and in accordance with our data retention guidelines and legal and regulatory obligations.

Your rights in relation to the information are set out in our Privacy Policy. This is available on our website foresters.com or by request from Customer Services on 0333 600 0333. The policy provides more detailed information on how to view, correct, withdraw or otherwise change the way we use the personal information.

If we have been unable to satisfy your concerns regarding any aspect of the processing or handling of the information you can contact the Information Commissioners Office on telephone helpline: 0303 123 1113, email visit www.ico.org.uk/global/contact-us/email/ or by post at Information Commissioners Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

By submitting the declaration you will be confirming that you have read this notice about using the personal information.

Electronic marketing preference

From time to time Foresters Financial will send information about relevant products and services via electronic methods such as email. We will not disclose your details to anyone outside of Foresters Financial for marketing purposes and you may change your marketing preference at any time.

Please choose if you are happy to receive marketing via electronic methods Yes No

6. Declaration and Transfer Authority

I apply to transfer the CTF detailed in this application to Forester Life Limited. I confirm that to the best of my knowledge and belief all of my answers are true and complete.

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,
- I have received the CTF Key Information Document(s) and brochure, which I have read.

I authorise Forester Life Limited:

- to hold the child's HM Revenue & Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;
- to make on behalf of the child any claims to relief from tax in respect of CTF investments; and,
- to use the child's and my personal information for the purpose set out under 'Using your Personal Information' section above.

I am aware that:

- a copy of my application and specimen Plan Document are available on request;
- the CTF transfer will not take place until expiry of the 30 day cancellation period; and,
- 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 or any gifter.

I agree to the CTF 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 not been provided with any financial advice from a Forester Life Financial Adviser in respect to this transfer.

I confirm I have read this Declaration in full and wish for this transfer application to proceed.

Signature of applicant

Date