Foresters Financial

Forester Life Child Trust Fund (CTF) - Transfer Application

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 now be some risk to the capital.

1. Planholder's (child's) Details

Plan Number

Title and Forename(s)

Surname

Date of Birth D D M M Y Y Y Y

Unique Reference Number *If we dont have this number then we cannot process your application*

Gender Male Female

Nationality

Address (permanent residence)

Postcode

2. Your Details (if different from the above)

Title and Forename(s)

Surname

Date of Birth D D M M Y Y Y Y

Gender Male Female

Address (permanent residence)

Postcode

Relationship to child

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)

4. Current CTF details

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

Name of CTF provider | Account No.

Address
(permanent residence)

Postcode

5. 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 %

Foresters Stakeholder (Schroders) Sustainable Future Managed Fund %

6. 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**

7. Declaration and 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 declare 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

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