Foresters Financial

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 Junior ISA 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)

If the child has an existing Junior ISA with Foresters, please provide the Plan Number:

Plan Number

Title and Forename(s)

Surname

Date of Birth D D M M Y Y Y Y

Gender ☐ Male ☐ Female

Address (permanent residence)

Postcode

National Insurance number ☐☐ ☐☐ ☐☐ ☐☐ ☐

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)

3. Junior ISA transfer details *(separate forms must be completed for each Junior ISA you are transferring)*

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

From (old manager) to (new manager) **Forester Life**

Address

Postcode

Please note you are transferring to a Stocks and Shares Junior ISA with Foresters.

Type of Junior ISA to be transferred:

☐ Stocks and Shares **The Junior ISA must be transferred in full.**

OR

☐ Cash **Indicate below whether to transfer in whole or in part:**

☐ Entire Junior ISA ☐ Current tax year subscriptions

☐ Previous tax year subscriptions - how much would you like to transfer? £ OR %

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 apply to transfer the Junior ISA 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 Junior ISA; and,
- I have received the Junior ISA Key Information Document(s) and brochure, which I have read.

I authorise Forester Life Limited:

- to hold the child's subscriptions, and any other rights or 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 above.

I declare that:

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

I authorise the ISA manager named above to:

- Provide Forester Life with any information which Forester Life may require in respect of the Junior ISA managed by them on my behalf, including but not limited to, transaction and dividend histories and details of the current portfolio and its value;
- Liquidate the plans indicated above and transfer them to Forester Life in the form of CASH;
- Cease future collections with immediate effect if I have chosen to have my Stocks and Shares Junior ISA transferred; 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 the gifter.

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 not been provided with any advice from a Forester Life Financial Adviser to transfer a Junior ISA.

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

Signature of applicant

Date

Foresters Financial