Triodos Bank.
Junior ISA or Child Trust Fund transfer authority form.

You must complete this form to transfer an existing Junior cash or Junior stocks and shares ISA, or Child Trust Fund from another provider to a Triodos Junior Cash ISA. **You need to already have or apply for a Triodos Junior Cash ISA separately before completing this form.**

If you wish to transfer more than one Junior ISA (i.e. a Junior cash ISA and a Junior stocks and share ISA) please complete a separate authority form for each one. Additional transfer authority forms can be downloaded from our website.

Please make sure that you complete all specified sections of this form.

This form should be completed either by printing a blank copy and filling in the required fields, or by filling in the fields online and then printing the form.

The declaration at the end of this form must be signed and dated by the account holder. You can then return the form by chat in internet banking or by post.

Our Freepost address is Royal Mail registered and simple to use. Write it exactly as shown below on your envelope and your letter will get to us free of charge (no stamp required): **Freepost TRIODOS BANK**

In some cases your existing provider may require an original form. In which case we will be in touch to arrange this.

If the details you provide as part of this application are different to the details we currently hold then we may change your existing record. You may be contacted to verify this change or to request further confirmation.

Transfers are subject to acceptance.

When we receive this completed form, we will contact your current ISA Manager or Child Trust Fund provider to arrange the transfer and write to tell you when it has been completed.

I apply to transfer a Junior ISA or Child Trust Fund for:

☐ A child aged 0-17 (start at Section 1)

☐ Myself, aged 16-17 (start at Section 2) You will be referred to in this instance as'the child'.

Section 1: Adult account operator/Registered Contact

Personal details

Full name (including title

Permanent residential address

Postcode

Section 2: Child's details

I apply to transfer a Junior ISA or Child Trust Fund for:
Full name

Date of birth

☐☐/☐☐/☐☐☐☐

National Insurance Number

Do you have a National Insurance Number?

Yes ☐ No ☐

If yes, please enter your National Insurance Number here

☐☐☐☐☐☐☐☐☐

Permanent residential address

Postcode

Contact details – of the person completing the form

Telephone (home)*

Mobile*

Email*

(*if you are happy to be contacted by telephone and email in the future)

Section 3: Information about the Junior cash or Junior stocks and shares ISA, or Child Trust Fund you wish to transfer to Triodos Bank

Please note that a child can only have one Junior cash and one Junior stocks and shares ISA at any one time, either with Triodos or any other provider, and cannot hold both a Junior cash ISA and a Child Trust Fund. If the child holds a Child Trust Fund, it must be transferred in full as part of the application for a Junior ISA.

What do you want to transfer?

☐ Junior cash ISA (complete section a)

☐ Junior stocks and shares ISA (complete section b)

☐ Child Trust Fund (complete section c)

Section a. The Junior cash ISA you are transferring FROM

Account number

☐☐☐☐☐☐☐☐

Sort code

☐☐-☐☐-☐☐

Reference number (if applicable)

From (name of your current ISA provider)

Have you subscribed to the Junior cash ISA that you are transferring to Triodos Bank in the current tax year?

Yes ☐ No ☐

Junior cash ISAs must be transferred in full and the account which is being transferred from then closed. You cannot partially transfer a Junior cash ISA.

Section b. The Junior stocks and shares ISA you are transferring FROM

Account number

Sort code

Reference number (if applicable)

From (name of your current ISA provider)

Have you subscribed to the Junior stocks and shares ISA that you are transferring to Triodos Bank in the current tax year?

Yes ☐ No ☐

How much of your Junior stocks and shares ISA do you want to transfer?

☐ The entire Junior ISA

☐ Part of the Junior ISA

If part of the Junior ISA, amount to transfer

If a part transfer, the amount of the current year subscriptions to be included in the transfer

If your subscriptions are invested in more than one share class,please specify the name of the share class(es) from which you would like to sell the shares

Section c. The Child Trust Fund you are transferring FROM

Child Trust Fund reference number

Reference/roll number (if applicable)

From (name of your current Child Trust Fund provider)

Section 4: Triodos Junior cash ISA you wish to transfer into

Account number

☐ Please tick here if you have recently applied for a new Triodos Ethical Junior Cash ISA and don't yet have the account number

Section 5: Application and declaration

(please read & sign)

I apply to transfer the child's existing Junior ISA or Child Trust Fund to Triodos Bank.

I declare that:

- I am 16 years of age or over;
- I am the child/I have parental responsibility for the child;
- I am the registered contact for the Junior ISA.
- I authorise Triodos Bank:to hold the child's cash subscriptions, Junior cash ISA 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 Junior cash ISA investments;
- to make any enquiries that you may consider necessary to confirm the details on this form.

I agree to the Junior cash ISA Terms and Conditions and Triodos Bank's General Terms and Conditions.

I acknowledge your right to suspend operations on this account until satisfactory identification details have been supplied. I declare that this application form has been completed to the best of my knowledge and belief and I will undertake to notify you without delay should any of the details change.

Transfer authority

I authorise the child's existing Junior ISA Manager or Child Trust Fund provider (as specified above) to transfer the Junior ISA (account number above) or Child Trust Fund (reference number above) to TRIODOS BANK.

I authorise the child's existing ISA Manager or Child Trust Fund provider to provide TRIODOS BANK with any information, written or non-written, concerning the Junior ISA or Child Trust Fund and to accept any instructions from them relating to the Junior ISA or Child Trust Fund being transferred.

Signature

Date

Section 6: Transfer acceptance

(to be completed by the new Junior ISA Manager)

In circumstances where the funds to be transferred are not cash deposits, please notify me as I may not be able to accept the transfer. Otherwise I (TRIODOS BANK) am willing to accept this investor's ISA/ Child Trust Fund funds, subject to HMRC rules (the ISA Regulations). I deem the date shown below to be the transfer date of this cash ISA/ Child Trust Fund.

Date

☐☐/☐☐/☐☐☐☐

Telephone: 0330 355 0355
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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