

# HL JUNIOR ISA TRANSFER FORM

Office use only  
IMST3

Use this form to transfer a Witan Child Trust Fund to the HL Junior Stocks and Shares ISA.

## Section 1 Child's details – the child is the owner of the investments held in the Child Trust Fund

Title	Own forename(s)	Own surname																			
Date of birth	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	National Insurance no. (if over 16)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											If the child is over 16 and has no NI No. tick here	<input checked="" type="checkbox"/>
D	D	M	M	Y	Y																
Nationality	Own address 1																				
Own address 2																					
Own address 3																					
Own address 4																					
Own address 5											Own postcode										

**Important:** the details you provide above MUST match what Witan holds for them, so please ensure your child's details are up-to-date before transferring.

## Section 2 Parent's/Guardian's details – you must be the registered contact for the Child Trust Fund to complete this form

Title	Own forename(s)	Own surname																			
Date of birth	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	National Insurance no.	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											If you have no NI No. tick here	<input checked="" type="checkbox"/>
D	D	M	M	Y	Y																
Nationality	Own address 1																				
Own address 2																					
Own address 3																					
Own address 4																					
Own address 5											Own postcode										
Email address (if applicable)											Daytime tel. no.										

Hargreaves Lansdown would like to contact you about the services we offer which may be of interest to you. We explain how we use your personal data in our Privacy Policy.

**If you like to hear from us, please tick the relevant box(es) below:**

**Email** – please contact me by email     **Phone** – please contact me by phone

## Section 3 Child Trust Fund transfer authority

Please transfer the **entire** Witan Child Trust Fund to the Hargreaves Lansdown Junior ISA  Account/reference number

I authorise Witan to discuss this transfer with Hargreaves Lansdown, including by telephone.

**I am the parent/guardian named in section 2 and I have read and agree to the declaration below.**

Signature: <b>X</b>	Date
Full name:	

## Section 4 Income instruction – once you've transferred, what would you like to do with any income from your child's investments?

**A**  **REINVEST INCOME AUTOMATICALLY**      **B**  **HOLD INCOME AS CASH IN THE JUNIOR ISA**

## Section 5 Declaration

For your own benefit and protection you should read our Terms & Conditions carefully before committing to an investment. If you do not understand any point please ask us for further information. When you use our services we will take this as acceptance and agreement of our terms, and you will be bound by them.

I am applying to transfer a Child Trust Fund. I declare that I am 18 years of age or over and have parental responsibility for the child named above. I am the registered contact for the Child Trust Fund being transferred.

I confirm that I have not subscribed and will not subscribe to another JISA of this type for this child. I am not aware that this child has another JISA of this type and I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit. I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded.

I authorise Hargreaves Lansdown to: a) hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash; and b) make on the child's behalf any claims to relief from tax in respect of JISA investments.

I have read, agreed to and retained the Terms & Conditions, Important Investment Notes and Key Features of the HL Junior ISA and my chosen investment including all costs and charges and, where available the Key Investor Information Document/Key Information Document provided to me on paper or via [www.hl.co.uk](http://www.hl.co.uk).

I confirm that to the best of my belief the information on this form is true and that this application form shall be the basis of the contract between me and Hargreaves Lansdown. I will notify Hargreaves Lansdown without delay of changes to these particulars. I have not received advice from Hargreaves Lansdown regarding the suitability of the HL Junior ISA or any aspect of this investment.

I understand that the Child Trust Fund I am transferring will be transferred into a Junior Stocks and Shares ISA and cannot be transferred back to a Child Trust Fund.

If I am transferring a stakeholder Child Trust Fund, I understand the following features are not included in a Stocks and Shares Junior ISA: Lifestyle from age 15, minimum subscriptions of £10 and an annual charge cap of 1.5%.