

# JUMP JUNIOR ISA (JISA) TRANSFER IN FORM

## Mandatory fields marked with\*

This form should be completed if you wish to transfer an existing Junior ISA into a Jump stocks and shares Junior ISA. **The minimum transfer amount is £1,000**; your existing JISA account must therefore be of £1,000 value **or** you can enclose a cheque made payable to Jump client a/c to make up the value of £1,000. Please read this form in conjunction with the Jump Important Information & Terms and Conditions, the Witan Key Information Document and the pre-sale (ex-ante) cost disclosure. Please complete this form in BLOCK CAPITAL letters, sign and return it to Jump, PO Box 10828, Chelmsford CM99 2BN.

## PART A: Application to transfer your Junior ISA account to Jump

### 1. Your Personal details (Registered Contact)

Your title*	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other title	<input type="text"/>
Your first name*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Your surname*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mother's maiden name* (required for security purposes)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Your 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"/>
National Insurance Number*	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>
Your permanent home address* House number or name*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address details*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postcode*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Daytime telephone number*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Place 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"/>	<input type="text"/>	<input type="text"/>
Nationality*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
If you are an existing Jump customer please enter your account number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### 2. I apply to transfer into a Jump Stock and Shares JISA for\*

- A child (please complete section 3)  **or** Myself
- If you are transferring the JISA for a child, please confirm you are the parent or legal guardian for the child

### 3. Child's details

Title*	<input type="text"/>
Child's first name*	<input type="text"/>
Child's surname*	<input type="text"/>
Child's permanent home address* House number or name* (if different to that in section 1)	<input type="text"/>
Address details*	<input type="text"/>
Postcode*	<input type="text"/>
Child's date of birth*	<input type="text"/>
Child's National Insurance Number* (if they have one)	<input type="text"/>

### 4. IFA (Independent Financial Adviser) Use Only

IFA FCA code

For internal use only

### 5. Your transfer instructions - Please instruct how you would like to invest\*

The minimum transfer amount to the Jump JISA is £1,000. If the value of your current JISA is less than £1,000 you will need to top this up through a lump sum contribution. If you would like to add a lump sum or set up a regular contribution to the JISA Account please complete the below:

Value £            .     
**Lump Sum**  
(Min £250)

Please enclose a cheque made payable to Jump Savings Client a/c

£                 .     
**Regular Sum**  
(Min £50)

Your bank account will be debited on the 15th day of the month or next working day thereafter.


For **Regular Sum** - Please advise frequency of payments required: **Monthly**  or **Quarterly**

Please note the maximum subscription for the 2018/19 tax year is £4,260.

### 6. Your preferences\*

- I would like to pay my Annual Management Fee:  
By direct debit (please complete section 7)  or for Witan Investment Services to sell my shares to cover the fee
- I would like to receive the Annual & Half Year Reports:  
By post  or By email notification

### 7. Direct Debit Details - Please complete this to set up regular payments and/or your Annual Management Fee

<b>Witan Investment Services Limited</b>	<b>Instruction to your bank or building society to pay by Direct Debit</b>	
Please fill in the form and send to: Jump, PO Box 10828, Chelmsford CM99 2BN. <b>Name and full postal address of your bank or building society</b>		
To: The Manager	Bank/building society	<b>Service user number</b> <input type="text" value="6"/> <input type="text" value="9"/> <input type="text" value="8"/> <input type="text" value="4"/> <input type="text" value="4"/> <input type="text" value="1"/>
Address		<b>Reference</b> <input type="text"/>
Postcode		<b>Instruction to your bank or building society.</b> Please pay Witan Investment Services Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Witan Investment Services Limited and, if so, details will be passed electronically to my bank/building society.
<b>Name(s) of account holder(s)</b> <input type="text"/>		<b>Signature(s)</b> <input type="text"/>
<b>Branch sort code</b> <input type="text"/>	<b>Bank/building society account number</b> <input type="text"/>	<b>Date</b> <input type="text"/>
<b>Banks and building societies may not accept Direct Debit Instructions for some types of account.</b>		
<b>DDI5</b>		

## 8. Declaration

### I declare that

- I have read and acknowledge the most recent version of the Witan Key Information Document and the pre-sale (ex-ante) cost disclosure.
- I am 16 years of age or over.
- I am the child/I have parental responsibility for that child.
- I am the registered contact for the Junior ISA ("JISA").
- The child is resident in the UK, or is a UK Crown servant or a dependant of a UK Crown servant or is married to/in a civil partnership with a UK Crown servant.
- I have not subscribed and will not subscribe to another stocks and shares JISA for this child.
- I am not aware that this child has another stocks and share JISA.
- I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit for the 2018/19 tax year of £4,260.
- I will not knowingly make subscriptions to JISAs for this child that will result in the £4,260 subscription limit for the 2018/19 tax year being exceeded.
- I am not aware that this child has a Child Trust Fund account.
- I authorise Witan Investment Services:
  - to hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash; and
  - to make on behalf of the child any claims to relief from tax in respect of JISA investments.
- I agree to be bound by the **Jump Important Information & Terms and Conditions** and will promptly inform you of any changes in my circumstances.
- I understand that this application is subject to acceptance by Witan Investment Services.
- I declare that the statements completed on this application are true to the best of my knowledge and belief.

Signature\*

Date\*

D	D	-	M	M	-	Y	Y	Y	Y
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**Witan Investment Services would like to keep you updated about their services or products. Please confirm your consent to receiving the following, by email, for Witan Investment Trust<sup>(1)</sup>:**

Company Updates, Newsletters and product offers & promotions

(1) By consenting to receive emails about Witan Investment Trust, you acknowledge that we will process your personal data (including your name and email address) for the purpose of sending you these emails. You may withdraw your consent at any time by following the unsubscribe instructions included in every email communication.

For further information on the processing of your personal data by Witan, please see Witan's Privacy Policy at: <https://www.witan.com/legal-information>.

## PART B: Current Junior ISA provider details and Transfer Authority

Name of current Junior ISA provider*	
Address of current provider*	
Postcode*	
Child's full name*	
Junior ISA Account Number*	
Type of Junior ISA with the current provider*:	
Cash <input type="checkbox"/> or Stocks & Shares <input type="checkbox"/>	
<b>Please note your holdings will be liquidated and transferred as cash.</b>	
<b>Please acknowledge the following declarations and thereby give Jump the necessary permission to undertake the transfer:</b>	
<input type="checkbox"/>	I hereby authorise you to transfer the existing Junior ISA account, detailed above, to the Jump Junior ISA with immediate effect.
<input type="checkbox"/>	I hereby authorise you to sell the holdings and transfer the Junior ISA as cash.
<input type="checkbox"/>	I hereby authorise you to provide the Administrator of Jump Junior ISA with all such relevant information relating to the Junior ISA which it may require.
<input type="checkbox"/>	I accept that there is a potential for loss of income or growth due to market fluctuations whilst the transfer is in the course of completion. Jump accept no liability for loss of opportunity during the transfer.
Full name*	
Signature*	
Date*	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Please ensure you return all parts of this form to Jump, PO Box 10828, Chelmsford CM99 2BN</b>	