

Transfer your Jump
Investments into a

JUNIOR ISA

0800 011 2015
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WISDOM WITH A YOUNG HEART

Witan Jump

TRANSFERRING EXISTING JUMP INVESTMENTS INTO A JUNIOR ISA

If you already have a Jump Savings Account with us but would like to transfer it into a Junior ISA, this is how you do it; you sell your existing Jump investments, transfer the funds into a Junior ISA, and then buy back the investment within the Junior ISA. This process is commonly known as a 'bed and breakfast'.

What is the process?

Step 1 - Check that the child you wish to transfer the investment to is eligible for a Junior ISA.

Step 2 - Open a Junior ISA account for the child. Please note only the parent can open the account however anyone can make an investment into the Junior ISA. Therefore we require you to complete both sections of the form.

- The first section is to be completed by the donor, the person who is currently named as the account holder of the Jump Savings Plan.
- The second section, which opens the Junior ISA account, can only be opened by the parent or legal guardian or the child (if they are over the age of 16).

Step 3 - Once we receive the application, the shares within the Jump Savings Plan will be sold on the next available business day. The proceeds will then be subscribed into a Junior ISA and the purchase undertaken on the subsequent business day.

Please be aware that you will not be invested for the period of time between the sale and the purchase and are therefore exposed to any market movements. As a result you could end up purchasing fewer shares than were sold.

Step 4 - If there are no shares left within the existing Jump Savings Account, it will be closed.

What is the cost?

You will be liable for the 0.5% stamp duty that is payable on all purchases of equities. There is also an Annual Management Fee charge. Jump does not pay commission to financial advisers. Please see the Product Terms and Conditions for further information.

Jump Junior ISA 'Bed & Breakfast' Application Form

Mandatory fields marked with*

The first part of this application form will need to be completed by the account holder of the existing Jump Savings Plan and the second part will need to be completed by the parent/legal guardian.

Please complete this form in block capital letters, and return it to Jump PO Box 10828, Chelmsford CM99 2BN. Please ensure you have read and understood the Jump Key Features and Terms & Conditions before completing this application form.

Jump Savings Account Holder

1. The existing Jump Savings Plan account

Your Jump account number*

Account designation* (normally the initials of the child)

2. Your details

First name* Surname*

Your permanent home address* House number or name*

Address details*

Postcode*

Your relationship to the child to whom this account is designated

Date of Birth* DD - MM - YY YY National Insurance Number* - -

Nationality*

3. Your transfer*

The minimum transfer amount to the Junior ISA is £250 and the maximum subscription you can make to a Junior ISA in the current (2017/18) tax year is £4,128. You must enter a fixed cash amount to be transferred, which must not exceed the maximum of £4,128.

I would like to transfer of my Jump Savings Plan

If your transfer value is less than £250 you will need to top this up, please complete section 5 to do this.

4. Transfer Declaration

I authorise Witan Investment Services (WIS) to sell the above stated value of shares within my Jump Savings Account and transfer the proceeds into the Junior ISA account stated below. I accept that WIS are not liable for any fluctuations in the value of the Witan share price during this process. I also accept that WIS is not responsible for any loss incurred as a result of any delays incurred during this process.

Signature

Date*

The Parent/Legal Guardian/Child (if over the age of 16)

Please note that although the parent might also be the donor we require you to re-supply all of your details because this application form relates to a new product.

1. Your personal details

Your title* Mr Mrs Miss Miss Other title

First name*

Surname*

Mothers maiden name*
(required for security purposes)

Date of Birth* National Insurance Number*

Your permanent home address* House number or name*

Address details*

Postcode* Daytime telephone number*

Your relationship to the child to whom this account is designated

Email address*

Place of birth* Nationality*

2. I apply to open a Junior ISA for:

A Child (if opening an account for a child please complete section 3) or Myself (Proceed to section 4)

If opening the account for a child please confirm you are the parent or legal guardian

3. Child's Details:

Child's title*

Child's first name*

Child's surname*

Child's date of Birth* Child's National Insurance Number*
(if they have one)

Child's home address*
(if different to that in section 1)

House number or name*

Address details*

Postcode*

4. Your preferences:

• I would like to pay my annual Management Fee:

By Direct Debit (please complete section 6) or For Witan Investment Services to sell shares to cover the fee

• I would like to receive the Annual & Half Year Reports By Post or By email notification

