

Transfer your Jump
Investments into a

JUNIOR ISA

0800 011 2015
witan.com/jump

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 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.

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* - - 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 (2018/19) tax year is £4,260. You must enter a fixed cash amount to be transferred, which must not exceed the maximum of £4,260.

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 Ms Other title

First name*

Surname*

Mother's 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


5. Instruction

- I would like to make an additional Lump Sum top-up investment of (minimum of £100, subject to the total of the transfer and this payment not exceeding £4,260). Please enclose a cheque made payable to Jump Savings Client a/c.
- And/or I would like to set up a regular investment of (minimum of £50 per month or quarter, subject to the total of the transfer and these payments not exceeding £4,260 this tax year). Your bank account will be debited on the 15th day of the month or next working day thereafter. Please complete section 6.

For regular Sum - please advise frequency of payments required: **Monthly** or **Quarterly**

Please note that more than one person can contribute to the Junior ISA account; however the total investment must not exceed £4,260 this (2018/19) tax year.

6. Direct Debit Details - Please complete this to set up your regular payments and/or pay your annual management fee

Witan Investment Services Limited	Instruction to your bank or building society to pay by Direct Debit	
Please fill in the form and send to: Jump, PO Box 10828, Chelmsford CM99 2BN.		
Name and full postal address of your bank or building society		
To: The Manager	Bank/building society	Service user number <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		Reference <input type="text"/>
Postcode		Instruction to your bank or building society. 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.
Name(s) of account holder(s) <input type="text"/>		Signature(s) <input type="text"/>
Branch sort code <input type="text"/>	Bank/building society account number <input type="text"/>	Date <input type="text"/>
Banks and building societies may not accept Direct Debit Instructions for some types of account.		
DD15		

7. 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/the child does not have a Child Trust Fund account.
- I will be 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.
- 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 shares 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 authorise Witan Investment Services:
 - to hold, or arrange a suitable third party to hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;
 - to make on the child's behalf 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*

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⁽¹⁾:

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>.

