

Junior ISA (Stocks & Shares) Transfer Application Form



By completing this form you are requesting to transfer a Junior ISA (JISA), currently held with another provider, to Metfriendly. The minimum transfer into a Junior ISA is £500, unless there will be monthly contributions meeting the product's minimum requirements. Please do not hesitate to contact our Member Services team on 01689 891454 should you have any queries or require further support.

I apply to transfer a Junior ISA for the child detailed below:

I understand that to transfer a Junior ISA (JISA) to us, a JISA application should be completed and returned to us by the person who is currently the Registered Contact for the JISA, with parental responsibility for the child whose JISA this application refers to.

Applicants Details (This should be the current Registered Contact – Parent/Legal Guardian).

| | | | |
|-------------------------------------|---------|----------------------|--|
| Warrant/Payroll No. (If applicable) | | Date of Birth | |
| Mr/Mrs/Ms/Miss | Surname | Forename(s) | |
| First line of home address | | Post Code | |
| Email Address | | Preferred Contact No | |

- We would like to email you from time to time with relevant information on financial issues relating to the police, such as police pay, and products and services we provide including special offers. If you would like to receive the above information **please indicate your consent by ticking the box to the left.** You will be able to unsubscribe from these communications easily and at any time.

Details of Child

| | | | |
|--|---------------|--|--|
| Child's Surname | | Child's Forename(s) | |
| First line of home address (if different to above) | | | |
| Postcode | Date of Birth | Gender M <input type="checkbox"/> F <input type="checkbox"/> | |
| Child's National Insurance Number (If aged 16 or over) | | | |

Tick to confirm that you have enclosed a copy of the child's birth certificate and that you as parent/guardian have signed it on the reverse to confirm that it is a true copy (always required)

Current Junior ISA Provider

Name:
Address:

Type of Junior ISA with the current provider

Stocks & Shares Junior ISA
Cash Junior ISA

(Please tick one box only)

Stocks & Shares Junior ISA:

Transfer the full balance

Cash Junior ISA:

Transfer the full balance

or

Transfer part of the account balance Amount to transfer £

If you are requesting a part transfer, amount of current year subscriptions to be included in the transfer £ (Enter "all" or specify an amount)

For your own benefit and protection, you should read the **Key Information Document (KID)** associated with this product, available by request or viewable at metfriendly.org.uk. A copy will also be posted to you once your policy is set up.

Declaration & Authorisation

I declare that:

- I am aged 16 or older
- I have parental responsibility for the child/am the child
- I wish to be the Registered Contact for the Metfriendly stocks and shares Junior ISA
(Please contact our Member Services Team on 01689 891454 or via email at info@metfriendly.org.uk if this is to be different)

I authorise Metfriendly:

- 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; **and**
- To open a Junior ISA and request a transfer from an existing CTF provider, asking them to transfer the CTF to Metfriendly, with the understanding that this is worth over £500, unless there will be monthly contributions meeting the product's minimum requirements.

I authorise my existing ISA Manager (as specified overleaf)

- To transfer the JISA (account number overleaf) to Metfriendly; **and**
- To provide Metfriendly with any information, written or non-written, concerning the existing JISA; **and**
- To accept any instructions from Metfriendly relating to the JISA being transferred.

Declaration

- I understand that should I wish to make regular contributions to a Metfriendly ISA, in addition to this transfer, I will need to complete an ISA application form
- I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appear on Metfriendly.org.uk and are available in printed form upon request).
- I agree to the ISA terms and conditions. I declare that the information given is correct to the best of my knowledge and belief.

Signed

Date

Promotional Code

Proof of ID

Unless you have already done so, please provide proof of identity (e.g. a copy of a passport, driving licence or birth certificate). We also need proof of address (e.g. a copy of an original bank statement or utility bill dated within the last three months, please note online statements are not acceptable). A driving licence is an acceptable proof of address if not also being used to prove identity. You should sign the back of each copy to confirm it is a true copy of the original. If you have any questions regarding these requirements, please call us on 01689 891454 or e-mail us at info@metfriendly.org.uk

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform this task. Where possible we use external information to verify your identity and to keep our records up to date on home address changes. We use a third party provider to deliver our marketing emails. We gather statistics around email opening and clicks using industry standard technologies. For more information, please see our privacy notice at www.metfriendly.org.uk/privacy

How did you hear about Metfriendly?

I am a member Newsletter I received a letter Brochure stand Intranet Received an email
Personal recommendation Internet search Twitter Facebook I spoke to a Metfriendly representative
I saw an advert - please state which publication Other - please state

Publication/Other

Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Fax: 01689 891455 Metphone: 846690 Email: info@metfriendly.org.uk

Metfriendly is a trading name of the Metropolitan Police Friendly Society Limited.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Incorporated under the Friendly Societies Act 1992 and registered in the UK No. 496F