

Triodos Bank.

Junior Stocks and Shares ISA or Child Trust Fund transfer authority form

You must complete this form to transfer an existing Junior cash or Junior stocks and shares ISA, or Child Trust Fund from another provider to a Triodos Junior Stocks and Shares ISA. **You need to already have or apply for a Triodos Junior Stocks and Shares ISA separately before completing this form.**

If you wish to transfer more than one Junior ISA (i.e. a Junior cash ISA and a Junior stocks and share ISA) please complete a separate authority form for each one. Additional transfer authority forms can be downloaded from our website.

Transfers from a Junior cash ISA usually take place within 15 business days of the transfer instruction being received by us. Transfers from other types of ISA can take up to 30 days from the request being received by us. These types of ISA transfer take longer as the investments must be sold first, before the cash can be transferred to your Triodos Junior Stocks and Shares ISA Cash Account

Please make sure that you complete all specified sections of this form.

This form should be completed either by printing a blank copy and filling in the required fields, or by filling in the fields online and then printing the form.

The declaration at the end of this form must be signed and dated by the account holder. You can then return the form by chat in internet banking or by post.

Our Freepost address is Royal Mail registered and simple to use. Write it exactly as shown below on your envelope and your letter will get to us free of charge (no stamp required): **Freepost TRIODOS BANK**

In some cases your existing provider may require an original form. In which case we will be in touch to arrange this.

If the details you provide as part of this application are different to the details we currently hold then we may change your existing record. You may be contacted to verify this change or to request further confirmation.

Transfers are subject to acceptance.

When we receive this completed form, we will contact your current ISA Manager or Child Trust Fund provider to arrange the transfer and write to tell you when it has been completed.

I apply to transfer a Junior ISA or Child Trust Fund for:

A child aged 0-17 (start at Section 1)

Section 1: Adult account operator/Registered Contact

Personal details

Full name (including title)

Permanent residential address

Postcode

Section 2: Child's details

I apply to transfer a Junior ISA or Child Trust Fund for:
Full name

Date of birth

/ /

National Insurance Number

Does the child have a National Insurance Number

Yes No

If yes, please enter your National Insurance Number here

Permanent residential address

Postcode

Contact details – of the person completing the form

Telephone (home)*

Mobile*

Email*

(*if you are happy to be contacted by telephone and email in the future)

Section 3: Information about the Junior cash or Junior stocks and shares ISA, or Child Trust Fund you wish to transfer to Triodos Bank

Please note that a child can only have one Junior cash and one Junior stocks and shares ISA at any one time, either with Triodos or any other provider, and cannot hold both a Junior cash ISA and a Child Trust Fund. If the child holds a Child Trust Fund, it must be transferred in full as part of the application for a Junior ISA.

What do you want to transfer?

Junior cash ISA (complete section a)

Junior stocks and shares ISA (complete section b)

Child Trust Fund (complete section c)

Section a. The Junior cash ISA you are transferring FROM

Account number

Sort code

- -

Reference number (if applicable)

From (name of your current ISA provider)

Have you subscribed to the Junior cash ISA that you are transferring to Triodos Bank in the current tax year?

Yes No

Junior cash ISAs must be transferred in full and the account which is being transferred from then closed. You cannot partially transfer a Junior cash ISA.

Section b. The Junior stocks and shares ISA you are transferring FROM

Account number

Sort code

- -

Reference number (if applicable)

From (name of your current ISA provider)

Have you subscribed to the Junior stocks and shares ISA that you are transferring to Triodos Bank in the current tax year?

Yes No

Junior ISAs must be transferred in full and the account which is being transferred from then closed. You cannot partially transfer a Junior stocks and shares ISA.

Section c. The Child Trust Fund you are transferring FROM

Child Trust Fund reference number

Reference/roll number (if applicable)

From (name of your current Child Trust Fund provider)

Section 4: Triodos Junior Stocks and Shares ISA you wish to transfer into

Account number

Please tick here if you have recently applied for a new Triodos Ethical Junior Stocks and Shares ISA and don't yet have the account number

Once the transfer is complete, your money will be paid into your Cash Account and you will then be able to buy shares in Internet Banking and/ or the Triodos Mobile Banking App.

We will send you a message in the app to let you know when your transfer has been completed and will keep you updated if there are any delays.

Section 5: Application and declaration (please read and sign)

I apply to transfer the child's existing Junior ISA or Child Trust Fund to Triodos Bank.

Transfer Authority

I authorise my existing ISA Manager (as specified on this form) to transfer the ISA (account number above) to Triodos Bank UK Ltd. I authorise my existing ISA Manager to provide Triodos Bank UK Ltd. with any information, written or non-written, concerning the Junior ISA or Child Trust Fund (CTF), and to accept any instructions from them relating to the ISA or CTF being transferred. I authorise Triodos Bank UK Ltd. to share the information on this form with my current ISA Manager.

ISA declaration

I declare that:

- All subscriptions made, and to be made, are considered a gift to the child I am 18 years of age or over
- I am the parent or have parental responsibility for the child
- I am the Registered Contact for the Junior ISA
- The child is resident in the UK (or otherwise eligible to subscribe to a Junior ISA)
- I authorise Triodos Bank UK Ltd. to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments and to make any enquiries that may be considered necessary to confirm the details on this form.

I confirm that I have read and understood in full the information contained in this Application Form, the relevant Key Investor Information Document(s), the Supplementary Information Document And Impact Investment Funds, Stocks and Shares ISA and Junior Stocks and Shares ISA Terms and Conditions.

These documents constitute the agreement between me and Triodos Bank and I agree to be bound by the terms and conditions contained therein. I have kept a copy of them for my records.

I declare that this application form has been completed to the best of my knowledge and belief and I will undertake to notify you without delay should any of the details change.

Signature

Date

/ /

Section 6: Transfer acceptance (to be completed by the new Junior ISA Manager)

In circumstances where the funds to be transferred are not cash deposits, please notify me as I may not be able to accept the transfer. Otherwise I (TRIODOS BANK) am willing to accept this investor's ISA/Child Trust Fund funds, subject to HMRC rules (the ISA Regulations). I deem the date shown below to be the transfer date of this cash ISA/Child Trust Fund.

Date

/ /

Your checklist

Please check you have completed sections 1-6.

Send the completed transfer authority form to:
Freepost TRIODOS BANK

Our freepost address is Royal Mail registered and simple to use - write it on your envelope exactly as shown above (no stamp required) and your letter will get to us free of charge by second class mail.

Alternatively, for first class mail, you can post your form to us using the below address:

Triodos Bank
Deanery Road
Bristol BS1 5AS

Large print, braille and audio versions
available on request.

Telephone: 0330 355 0355 (if calling from the UK) or +44 (0)117 973 9339
(if calling from abroad)

www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring
purposes.

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