

# Junior ISA Transfer Form

USE THIS FORM TO TRANSFER AN EXISTING JISA HELD WITH ANOTHER MANAGER

## 1. Transfer Form

TO BE COMPLETED BY ALL APPLICANTS

### Applicants Details (Registered contact)

Title (Mr/Mrs/Miss/Ms)

Surname

Forename(s)

Permanent residential address

Postcode

Telephone (Home)

Telephone (Work)

Telephone (Mobile)

Email

### Child's Details

Title (Mr/Mrs/Miss/Ms)

Surname

Forename(s)

Permanent residential address

Postcode

Date of birth

Childs NINO (if they have one)

## 2. JISA Transfer

### Existing JISA Manager Details

Name

Address

Postcode  Telephone

JISA Account Number

I hereby authorise you to transfer this account to Jarvis Investment Management Ltd on their written instruction to do so and provide such information regarding my above specified Account which they may require.

I wish to transfer my JISA in cash  in shares  both  (✓one box)

**Please read the Authorisation section carefully before signing below.**

Signed  Date

### Authorisation

I confirm that the information is true and complete. I have read, understood and acknowledge the risk warning issued by the Account Manager. I agree to be bound by the enclosed Terms and Conditions. For the purpose of our Terms and Conditions JISAs are classed as ISAs.

On completion please return to: The Account Manager, Jarvis Investment Management Ltd, 78 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS.  
Additional forms are available on request.