

Junior ISA Transfer Form

USE THIS FORM TO TRANSFER AN EXISTING ACCOUNT HELD WITH ANOTHER MANAGER
If you do not yet have a JISA share dealing account with ourselves, you will need to complete an application form as well.
Please use a separate form for each Broker you are transferring from.

1. Transfer Form

TO BE COMPLETED BY ALL APPLICANTS

Applicants Details (Registered contact)

Title (eg. Mr/Mrs/Dr etc)

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)

Authorisation

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.

Signature of Registered Contact

Date