

Once completed please return the form to the following address.

'FREEPOST UNITY MUTUAL' (only use BLOCK letters)

1. Registered contact details												
Surname				Title								
Forename(s)				Date of Birth			d	d	m	m	y	y
Address												
				Postcode								
Tel No. (Home)						Tel No. (Mobile)						
Email												
2. Child's details												
Surname				Title								
Forename(s)				Date of Birth			d	d	m	m	y	y
Address												
Postcode				NI Number								
3. Current Junior ISA or CTF Provider												
Name of existing provider												
JISA/CTF Account No (URN)												
Provider's address												
				Postcode								
Type of Junior ISA/CTF with current provider				CASH / STOCKS & SHARES *			* delete as appropriate					
Type of Junior ISA you will be transferring to				STOCKS & SHARES								
4. Transfer details												
For Junior ISA transfers please confirm what you wish to transfer:												
i. Transfer the FULL balance of the account				YES / NO *								
NB. If you are transferring from another Stocks & Shares JISA you must transfer the 'Full balance' as you can only hold one.												
ii. For partial transfers input the amount to be transferred:				£								
And the amount of current year subscriptions included in the transfer:				£								
Please note; if you are transferring from a Junior ISA that holds stocks and shares the investments will have to be sold. If the markets rise whilst the transfer is being completed it is possible you could lose out; we do not accept any liability for any such loss.												

5. Declaration

I apply to transfer my existing JISA or CTF into a **Unity Mutual Junior ISA** and I declare that:

- I am 16 years of age or over;
- I have parental responsibility for the child/I am the child (delete which does not apply)
- I am the registered contact for the CTF (if applicable)
- I will be the registered contact for the Junior ISA
- The child is a resident and ordinarily resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a civil partnership with a UK Crown servant
- I have not subscribed and will not subscribe to another Junior ISA of this type for this child
- I am not aware that this child has another Junior ISA of this type
- I am not aware of other Junior ISA subscriptions that will result in this child exceeding the annual limit
- I will not knowingly make subscriptions to Junior ISAs for this child that will result in the subscription limit being exceeded

I authorise Unity Mutual:

- to hold the child's subscriptions, Junior ISA investments, interest, dividends and an other rights or proceeds in respect of those investments and cash;
- to make on my behalf of the child any claims to relief from tax in respect of ISA investments; and

For a CTF transfer I confirm that:

- I understand that I am applying to transfer a stakeholder CTF; and
- I understand that the Junior ISA does not have lifestyling as age 15.

I confirm that:

- I understand that I have received no advice from you and have decided to invest based on the information provided in your Key Information Document;
- I understand the charges associated with this product;
- I am comfortable with the level of risk associated with this product, and that my investment could increase or decrease in value, and that I could get back less than I paid in; and
- I understand that the past investment performance of this product is not a guide to future performance.

I agree to the Stocks & Shares Junior ISA Terms & Conditions and I declare that this application form has been completed to the best of my knowledge and that the information provided is true.

Signature **Date**

6. Data Protection

The information you provide within this application form is used to process your application and administrate your Junior ISA policy and will be stored and processed in line with General Data Protection Regulations.

As a policy holder of Unity Mutual we may wish to contact you in the future with information in relation to products that we believe may be of interest to you. These communications will relate to products and services that we offer that are similar or complimentary to the policy you hold with us. Please rest assured we will never share your data with any third party without your consent.

Your data is processed on a legitimate interest basis in relation to the communications you will receive. For more information on how your data is processed and looked after please visit our Privacy Notice on www.unitymutual.co.uk/privacy/.

Should you wish for these communications to stop please tick the appropriate boxes.

Post Email Telephone (home) Telephone (mobile – including SMS/MMS)

Your preferences will remain in place until you let us know otherwise. You can update us at any time, opting in or out of marketing, or change the ways in which you would prefer us to contact you. You can update your marketing preferences by contacting us directly. You can find further information at www.unitymutual.co.uk/privacy/.

