

### Ready to apply

Please complete this form if you wish to transfer to our Junior ISA (JISA). If you would like any help you can contact us on **0161 214 4650**. If you wish to make additional contributions to your Junior ISA please also complete Sections 6 and 7. We will work with your current Junior ISA provider to do the transfer as quickly as possible. Once completed, please return the form to freepost address: **FREEPOST UNITY MUTUAL**

#### 1. Registered contact details

|   |               |                |
|---|---------------|----------------|
| Title   | First name    | Middle name(s) |
| Last name   | Date of birth | dd/mm/yy       |
| Current address   |               |                |
|   |               | Post code      |
| Telephone   | Mobile        |                |
| Email   |               |                |
| Can we use this Email address to send your documentation to? <input type="checkbox"/> Yes <input type="checkbox"/> No |               |                |

#### 2. Child details

|                 |               |                |
|-----------------|---------------|----------------|
| Title           | First name    | Middle name(s) |
| Last name       | Date of birth | dd/mm/yy       |
| Current address |               |                |
|                 |               | Post code      |
| NI number*      |               |                |

#### 3. Details of the Account being transferred:

|  |  |
|--|--|
| Current Account Number   | Name of current provider   |
| Provider address   |  |
| Post code  |  |
| Type of Account  | <input type="checkbox"/> Stocks & Shares Junior ISA <input type="checkbox"/> Cash Junior ISA |
| Have you subscribed to your existing JISA in the current tax year?   | <input type="checkbox"/> Yes <input type="checkbox"/> No         If Yes, how much? £         |
| If transferring from a Stocks & Shares JISA you must transfer the whole balance for the current tax year.  |  |
| Do you wish to transfer the whole balance?   | <input type="checkbox"/> Yes <input type="checkbox"/> No         If No, how much? £          |
| Please note:   |  |
| <ul style="list-style-type: none"> <li>Your existing provider may have specific rules around transferring your existing JISA. They may also need you to give them specific information before the transfer can go ahead. Please check with your existing ISA provider if you are not sure about this.</li> <li>We will only accept the monetary value of the transfer-in and not the assets held within it. It is not possible to transfer other assets, such as shares, into the JISA.</li> </ul> |  |

### 3. Transfer Instruction

I authorise my existing ISA provider as specified overleaf to sell investments and transfer the Junior ISA in cash (account number in Section 2) to Unity Mutual. I authorise my existing Junior ISA provider to provide Unity Mutual with any information concerning my Junior ISA and to accept any instruction from them relating to the Junior ISA being transferred.

Where I must give notice to close or transfer part of the existing Stocks & Shares Junior ISA, or the existing Stocks & Shares Junior ISA contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing Junior ISA provider to either (tick the appropriate box):

☐ No notice required for transfer of closure.

Where I must give notice to close or transfer part of the existing Junior ISA in accordance with the terms and conditions applying to that account, or the existing Junior ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing Junior ISA provider to either:

☐ Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer;

or; ☐ Carry out the transfer as soon as possible – I will accept any loss of interest or exit charges that may be applied in accordance with the terms and conditions applying to that account.

**Sign Here**



**Date** dd/mm/yy

### 4. Transfer Acceptance (to be completed by Unity Mutual)

We are willing to accept this Junior ISA transfer in line with the customer's instructions above, as long as the value is transferred as cash. We deem the date shown to be the transfer date of this Junior ISA:

dd/mm/yy

**Signature on behalf of Unity Mutual**

### 5. Making payments

The current JISA subscription limit is £9,000 per tax year.

#### 5a. Lump Sum payment

If you would like to make an lump sum payment, choose whether you would like to pay by bank transfer or by cheque:

|                |  |                 |   |                               |
|----------------|--|-----------------|---|-------------------------------|
| Payment method | <input type="checkbox"/> cheque <input type="checkbox"/> bank transfer | Lump sum amount | £ | <i>*minimum amount is £10</i> |
|----------------|--|-----------------|---|-------------------------------|

**Bank Transfer:** Account name: **Unity Mutual One** Sort Code: **30-95-42** Account: **7 2 6 0 2 1 6 8** Please use your name as a reference.

**Cheque:** Please make your cheque payable to **Unity Mutual** and enclose it with your application form.

#### 5b. Regular Direct Debit

If you would like to set up a regular payment, choose if you would like to pay monthly/yearly and how much you would like to pay:

|   |    |  |
|---|----|--|
| <input type="checkbox"/> Monthly Collection date <input type="checkbox"/> 1st <input type="checkbox"/> 15th <i>Choose one</i><br><input type="checkbox"/> £25 <input type="checkbox"/> £30 <input type="checkbox"/> £40 <input type="checkbox"/> £50 <input type="checkbox"/> £100<br>Other £ <i>*minimum monthly amount is £10</i> | or | <input type="checkbox"/> Yearly Collection date <input type="checkbox"/> 1st <input type="checkbox"/> 15th <i>Choose one</i><br><input type="checkbox"/> £300 <input type="checkbox"/> £500 <input type="checkbox"/> £600 <input type="checkbox"/> £800 <input type="checkbox"/> £1,000<br>Other £ <i>*minimum yearly amount is £120</i> |
|---|----|--|

### 6. Instruction to your bank or building society to pay by Direct Debit



#### Instruction to your Bank or Building Society to pay by Direct Debit



Please fill in the whole form and send it to:

Unity Mutual, Oddfellows House, 184-186 Deansgate, Manchester, M3 3WB  
Name and full postal address of your Bank or Building Society

To: The Manager Bank/building society

Address

Postcode

Name(s) of Account Holder(s)

Bank/Building Society account number

Branch Sort Code

Service user number

8 4 0 4 8 2

Reference

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
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|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

Instruction to your Bank or Building Society

Please pay Unity Mutual Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.  
I understand that this Instruction may remain with Unity Mutual and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)

Date

DDI 8 5/15

Banks and Building Societies may not accept Direct Debit Instructions for some types of account.  
This guarantee should be detached and retained by the payer.

### The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Unity Mutual will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Unity Mutual to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Unity Mutual or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
- If you receive a refund you are not entitled to, you must pay it back when Unity Mutual asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



## 7. How your information will be used

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

As a policyholder 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 at [unitymutual.co.uk/privacy](https://unitymutual.co.uk/privacy)

Would you like to receive information and offers about our products & services?

If you would like to hear about latest offers and information about our products and services please tick the appropriate boxes:

☐ Email ☐ Post ☐ Phone ☐ Text Message

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.

## 8. Declaration - please ensure you sign and date this section

### 8a. I declare that:

- I am 16 years of age or over;
- I have parental responsibility for the child or I am the child
- 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

### 8b. I authorise Unity Mutual:

- To hold the child's subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and

- To make on my behalf of the child any claims to relief from tax in respect of ISA investments.

### 8c. For a CTF transfer I confirm that:

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

### 8d. 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.

### 8c. I agree to inform Unity Mutual in writing immediately of any changes in my details.

### 8d. I have read and understand the Key Information Document and Terms & Conditions of this product.

- I declare that this application has been completed to the best of my knowledge and belief.

Sign Here



Date dd/mm/yy

## 9. Further information

Promo code

How did you hear about us?

**Retain for Direct Debit Guarantee**

Once completed, please return the form to freepost address: **FREEPOST UNITY MUTUAL**

Unity Mutual is a trading name of The Independent Order of Odd Fellows Manchester Unity Friendly Society Limited, Incorporated and registered in England and Wales No. 223F. Registered Office Oddfellows House, 184-186 Deansgate, Manchester M3 3WB. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, registration No. 109995