

# Junior ISA Transfer Authority Form

For transferring a Cash ISA from another provider to Loughborough Building Society.

Account Number (for office use only)		Customer Number	
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**Registered Contact**

Customer Number (for office use only)

Title

Forename(s)

Surname

Address

Post Code

Tel. No(s) Daytime:  Evening:  Mobile:

Email

Date of birth  -  -

Are you an existing account holder with the Loughborough? If Yes, please supply account number:

**Childs Details**

Customer Number (for office use only)

Title

Forename(s)

Surname

Address

Post Code

Date of birth  -  -

Are you an existing account holder with the Loughborough? If Yes, please supply account number:

National Insurance Number (if applicable)

**Information about the ISA you want to transfer (FULL TRANSFERS ONLY)**

Current Provider:

Account Number :  Sort Code :

Roll No. (if applicable)

**Please note that a child can only have one Junior Cash ISA at any one time, either with The Loughborough or any other provider, and cannot hold both a Junior Cash ISA and a Child Trust Fund.**

Have you paid money in to this Cash ISA in the current tax year?(Please tick) Yes  No

**Junior Cash ISA's must be transferred in full and the account which is being transferred from then closed. You cannot partially transfer a Junior Cash ISA.**

**Transfer Authority**

I agree to the Junior Cash ISA terms and conditions and The Loughborough General terms and conditions.

I declare I am the child/ I have parental responsibility for the child

I authorise the child's existing Junior ISA provider to transfer the Junior ISA (Account number above) to The Loughborough.

I authorise the existing provider to provide The Loughborough with any information concerning the Junior ISA and to accept any instructions from them relating to the Junior ISA being transferred.

Signature		Date	
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**Transfer Acceptance (for office use only)**

Loughborough Building Society is willing to accept this ISA transfer in line with the customer's instructions above, as long as the following conditions are met.

\* The transfer proceeds are made up of cash deposits only

\* We must receive the transfer proceeds no later than :

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\* Where the customer has shown they want to transfer subscriptions from the current tax year, these must not be more than:

£	
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**For the purpose of the transfer of the ISA wrapper under the regulations, the date shown below will be the transfer date.**

Date form received by Loughborough Building Society

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Dept: Customer Services, 6 High Street, Loughborough. LE11 2QB. Email Investments@theloughborough.co.uk Tel:01509 610707