

Junior ISA Transfer Authority Form



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

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|--------------------------------------|----------------------|-----------------|----------------------|
| Account Number (for office use only) | <input type="text"/> | Customer Number | <input type="text"/> |
|--------------------------------------|----------------------|-----------------|----------------------|

Registered Contact

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|--|--|
| Customer Number (for office use only) | <input type="text"/> |
| Title | <input type="text"/> |
| Forename(s) | <input type="text"/> |
| Surname | <input type="text"/> |
| Address | <input type="text"/> |
| | <input type="text"/> |
| | Post Code <input type="text"/> |
| Tel. No(s) | Daytime: <input type="text"/> Evening: <input type="text"/> Mobile: <input type="text"/> |
| Email | <input type="text"/> |
| Date of birth | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Are you an existing account holder with the Loughborough? If Yes, please supply account number: <input type="text"/> | |

Childs Details

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|--|--|
| Customer Number (for office use only) | <input type="text"/> |
| Title | <input type="text"/> |
| Forename(s) | <input type="text"/> |
| Surname | <input type="text"/> |
| Address | <input type="text"/> |
| | <input type="text"/> |
| | Post Code <input type="text"/> |
| Date of birth | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Are you an existing account holder with the Loughborough? If Yes, please supply account number: <input type="text"/> | |
| National Insurance Number (if applicable) | <input type="text"/> |

Information about the ISA you want to transfer (FULL TRANSFERS ONLY, Child Trust Fund transfers are not allowed)

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|--------------------------|----------------------|-------------|----------------------|
| Current Provider: | <input type="text"/> | | |
| Account Number : | <input type="text"/> | Sort Code : | <input type="text"/> |
| Roll No. (if applicable) | <input type="text"/> | | |

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 | <input type="text"/> | Date | <input type="text"/> |
|-----------|----------------------|------|----------------------|

Transfer Acceptance (for office use only)

Loughborough Building Society is willing to accept this JISA 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: Savings Team, 56 Woodgate, Loughborough. LE11 2TZ. Email savings@theloughborough.co.uk Tel:01509 610707