





## 2 About you – the account holder’s parent or guardian (continued)

**Your address (if different to the child) – ‘Care of’ and PO Box are not acceptable. Only UK addresses are eligible unless you or your spouse /civil partner are a Crown Employee or British Forces Posted Overseas.**

House number/name

Street, city, county and country

  
 Postcode 

Phone number

Mobile number

Email

## 3 Declaration and signature

- I apply to transfer a Child Trust Fund in cash for the child named in section 1 of this application.
- I have parental responsibility for the child named in this application and I am the registered contact for the Child Trust Fund and I will be for the Junior ISA being opened..
- I am 18 years of age or over.
- The child named in this application is resident in the UK.
- I have read and saved or printed the latest version of:
  - Key Features documents - Doing Business with Fidelity and the Client Terms
- I accept the Client Terms.
- I accept the assets will be sold and transferred as cash.
- I understand that the Child Trust Fund account I am transferring will be transferred into a Junior Stocks and Shares ISA and cannot be transferred back to a Child Trust Fund and the child does not hold any other Child Trust Fund account or stocks and shares Junior ISA currently
- I authorise Financial Administration Services Limited 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

- Make on the child’s behalf any claims to tax relief in respect of Junior ISA investments.
- I understand that the information I provide in this application will be processed in accordance with the data protection statement in the Client Terms.
- The information I have provided in this application is correct, to the best of my knowledge, and I will inform Fidelity immediately of any changes.

Signature

Print name

Date

(DDMMYYYY)

## 4 Intermediary details – to be completed by the intermediary

### Unique Adviser Number

**Office use only**   
Please ignore

### FCA number

I confirm that I am registered with the FCA to conduct business and my authorisation number is:

### Have you provided a personal recommendation?

(You must mark an X in either the Yes or No box)

Yes

No

An Initial and Specified Fee cannot be applied to this type of instruction.

An Adviser Ongoing Fee cannot be applied to this type of investment using an application form. If you would like to setup an Adviser Ongoing Fee this must be done online once the assets have been received.

### Verification of identity


I confirm and consent to Fidelity's reliance on the fact that I have verified the parent of the account holder in accordance with the UK Money Laundering Regulations and standards set in guidance issued by the JMLSG and will retain the supporting documentation for five years after the end of the relationship with the client.

This confirmation must carry an original signature or electronic equivalent.

I confirm that I have provided the client with the appropriate documentation for their investment:

- The Key Features Document - Doing Business with Fidelity Adviser Solutions.
- Personal Illustration.
- The Fidelity Adviser Solutions Client Terms.

### Signature of intermediary



### Date

(DDMMYYYY)



# Child Trust Fund (CTF) Transfer Letter of Authority

Please complete in BLOCK CAPITALS using BLACK INK. PLEASE NOTE: Any applications received that are not completed correctly may incur delays or may have to be returned to you.

**This Letter of Authority MUST be submitted with a Junior ISA Application Form.**

## 1 Child details (as registered at the existing CTF manager)

Please enter below the details held by your existing CTF Manager.

**Title**

**Surname**

**First and other names in full**

**Postcode**

**Child's unique reference number**

(this must be completed or your application will be rejected)

## 2 About you – the registered contact for the CTF

**Title**

**Surname**

**First and other names in full**

**Postcode**

## 3 CTF manager details

**Name of existing manager**

**Account number**

**Account type**

Cash  Stocks and Shares

**Address**

  
  
 Postcode 

/06.22/v1.0/ M2

CTFTransfer

## 4 Declaration and signature

By completing this form and signing below I hereby authorise the CTF manager named to:

- Sell and transfer as cash all previous and current tax year CTF holdings.
- Provide Fidelity with any information which they might require in respect to the CTF managed by them on my behalf, including, but not limited to transaction and dividend histories and details of the current portfolio and its value.
- Cease collections of any regular savings plan with immediate effect.

**Signature**



**Date**

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 (DDMMYYYY)

Please send your completed CTF Transfer form together with your completed Letter(s) of Authority to your Intermediary or to Fidelity, PO Box 391, Tadworth, KT20 9FU.  
Issued by Financial Administration Services Limited, authorised and regulated by the Financial Conduct Authority.