COVENTRY Building Society

Junior ISA (JISA) transfer request

From another JISA provider to Coventry Building

Transfer to Coventry Building Society cash ISA number | App:

This form is required to transfer an existing JISA to Coventry Building Society. It must be completed by the registered contact who is named on the account or by the child, if aged 16 or over and the account is in their sole name.

This form does not give authority to make any change to the registered contact of the JISA. The registered contact for both JISA's must be the same person.

Please use **BLOCK CAPITALS** and complete all sections of this form.

Before completing the form please check whether your current JISA has any restrictions on withdrawals, particularly when transferring from a junior stocks and shares ISA.

Registered contact (if applicable)

Name

Permanent residential address

Country of residence

Date of birth

National Insurance number (if you have one)

Telephone numbers:

Home | Work | Mobile

Email address

Child's details

I apply to transfer a JISA for:

Name

Permanent residential address

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Country of residence			
Date of birth		National Insurance number (if you have one)	
Telephone number			

The child named above will be the beneficial owner of all funds deposited into the account.

Coventry JISA that transfer will be made to

Please transfer funds into the following account:

An existing Coventry Junior Cash ISA (account number) ☐☐☐☐☐☐☐☐☐☐ (if transferring from a stocks and shares ISA)

or

A new Coventry Junior Cash ISA (completed application form enclosed) ☐

Current JISA provider:

Name of current JISA provider

JISA account number ☐☐☐☐☐☐☐☐☐

Sort code ☐☐ - ☐☐ - ☐☐

Roll/reference number (if applicable) ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Your transfer instructions

Type of JISA to be transferred (please tick one)

- Cash (the full balance will be transferred) ☐
- Stocks and shares* ☐

If stocks and shares, would you like to transfer (please tick one)

- All of the balance ☐
- Part of the balance ☐ Amount to transfer £

If transferring part of a Stocks and Shares JISA, would you like to transfer (please tick one)

- All current year's subscriptions ☐
- None of current year's subscriptions ☐
- Part of the current year's subscriptions ☐ £

* Please note that you are transferring into a Junior Cash ISA with Coventry Building Society as we do not offer a junior stocks and shares ISA.

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I instruct my current JISA provider to: (please tick one)

☐ only go ahead with the transfer **after** the maturity date or at the end of the notice period for the JISA being transferred, whichever is applicable. I confirm that the funds will be available to transfer within 30 days and eligible for transfer into a JISA;

or

☐ carry out the transfer as **soon as possible** and I will accept any loss of interest or charges which may be applied as a result of this, subject to the terms and conditions of the JISA.

Important note: If it will be more than 30 days before the funds are available to transfer, please contact us to discuss your options.

Transfer authority

I authorise the current JISA provider to transfer the JISA detailed above to Coventry Building Society. I authorise the current JISA provider to provide Coventry Building Society with any information, written or non written, concerning the JISA and to accept any instructions from Coventry Building Society, relating to the JISA being transferred.

Signed

Date dd / mm / yyyy

To be signed by the adult with parental responsibility named overleaf or the child themselves, if aged 16 or over and no adult is named on the account.

What happens next?

Please take this completed transfer form and if you are applying for a new JISA, your new account application form, to your local branch or agency or post it to:

FREEPOST CBS CUSTOMER SERVICES

It's important that you write the address exactly like this, in capital letters.

When we have received your completed transfer form we will contact your current JISA provider to arrange the transfer of JISA funds into your account with the Coventry. If you have a JISA passbook please DO NOT send this to us - your current JISA provider will contact you if they require it.

We will write to confirm when your JISA funds have been transferred into your Coventry JISA.

Transfer acceptance – for office use only

For the purposes of the transfer of the ISA wrapper under ISA regulations, the date shown below will be the transfer date.

dd / mm / yyyy