

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

Continued on the next page



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

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.