



# Junior Isa transfer authority

## Cash transfer only

Please complete and sign before forwarding to us at the address below, or via Jira messaging.

 Nucleus Client Relations, PO Box 26968, Glasgow G2 9DY

 If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

 If you've any questions, please don't hesitate to contact our client relations team.

 0131 226 9535  [client.relations@nucleusfinancial.com](mailto:client.relations@nucleusfinancial.com)



### Important information

Where necessary, we'll send a scanned copy of this form to the ceding scheme via email. However, in some cases forms may need to be posted, we would like to remind you to double check the ceding company address being added to this form. Nucleus don't maintain a register of provider addresses and therefore depend on the information included on this form. If this address is incorrect, it may ultimately cause delays to receipt of the transfer proceeds.

### To: Plan/Account manager (ceding scheme)

Full manager name and address

Reference: Stocks and shares JISA account / cash JISA account / Child Trust Fund plan number

Contact email address

I authorise Nucleus to approach the plan / account manager (detailed above) to obtain relevant information regarding my plan / account and authorise the plan / account manager to disclose such information.

Contact phone number

I request that the plan / account manager (detailed above) transfers the appropriate cash value from the accounts detailed opposite to Nucleus Financial Services Limited.

Residual monies (i.e. interest and distributions) applied to the account post transfer should be transferred to Nucleus Financial Services Limited, quoting client name and Nucleus account number. There is no minimum acceptance level.

### Personal details

Name of registered contact

Child Trust Fund URN (where applicable)

Name of child

Residential address of child

Nucleus client reference of child (if known)

Child's NI number (where available)

Child's date of birth

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### Cash value of holdings to be transferred

Entire JISA - state how much you have subscribed in the current tax year.

£

All current tax year investments - state how much you have subscribed in the current tax year (under HMRC rules, current tax year investments can only be transferred in full)

£

Previous tax years' investments, as follows:

- All previous tax years' investments

£

Or

- The following amount from the previous tax years' investments

£

I declare that I am aged 18 or over, have parental responsibility for the child, and am the registered contact for the JISA referenced above.

Signed (I am the child / I have parental responsibility for the child (delete which does not apply))

Date

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Typetalk service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com