

## Junior Isa transfer authority: cash transfer only

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY

Please complete and sign this form before sending it to us at the above address. If the form is signed but not dated by any party, then we'll use the date we receive the form as the date of signature.

If you have any questions please contact your client relations manager who will be delighted to help.

To: plan / account manager

Child Trust Fund URN (where applicable)

Full manager name and address

Residential address of child

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

Child's NI number (where available)

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.

### Cash value of holdings to be transferred

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

All holdings (approximate value)

£

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.

or

Tax years (please specify)

### Personal details

Name of registered contact

Signed

Name of child

Nucleus client reference of child (if known)

Date

Child's date of birth