

CTF TRANSFER FORM

I wish to transfer to a Pilling non-stakeholder CTF or a Pilling stakeholder CTF

Details of the person with parental responsibility for the child

Title First Names (in full)

Surname

Permanent Residential Address

Postcode

Tel (Home)

Tel (Work)

Fax

Tel (Mobile)

E-Mail

I apply to transfer a CTF for :-

Child's title First Names

Child's Surname

Child's Address

Post Code

Child's Date of Birth (as on voucher)

Child's unique reference number (as on voucher)

Current CTF providers details: - Name

Address

Telephone number

Account Number

(tick one box only)

Please transfer the above CTF immediately in its current form to Pilling & Co **OR**

Please liquidate the above CTF immediately and transfer the cash to Pilling & Co

Please deduct any charges for this service from the cash in the CTF

I declare that

- I am 16 years of age or over.
- I have parental responsibility for the child.
- I will be the registered contact for the CTF.
- I authorise Pilling & Co to hold the child's Inland Revenue contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and to make on the child's behalf any claims to relief from tax in respect of CTF investments.
- I agree to the CTF terms and conditions.
- I agree to Pilling & Co's Terms & Conditions for this plan as set out in the "Introductory Guide" (enclosed or available on request) and that they may alter to comply with changes to CTF regulations.

Signed

Date

PLEASE NOTE :- For us to accept instructions on this account from someone other than the registered contact (eg. Spouse, partner etc.) please enclose a signed letter of authority with this form.

Important note

You have a responsibility when choosing investments for a non stakeholder CTF to ensure your selection has a suitable risk profile for the child. High risk investments may not be purchased for a CTF. We will use our best endeavours to inform you if we believe your investment choice is high risk. We reserve the right to refuse to carry out investment instructions if we believe them to be unsuitable. However, we accept no responsibility if high risk investments are purchased.

Taking the size of a CTF investment into account, you should be aware that if you split the funds into more than one investment, the minimum commission charges and ongoing dividend handling fees could negate any income or increase in value and affect the overall performance of the CTF. As an alternative, you may wish to consider our stakeholder CTF which is invested in a fund that gives a good spread of investments.