Junior ISA Transfer Form

This form lets you transfer an existing Junior ISA into a Junior ISA with Söderberg & Partners Wealth Management.

Seccl Custody Limited (SCL) is the Junior ISA Manager in respect of the Söderberg & Partners Wealth Management Junior ISA. SCL is approved by HM Revenue & Customs for this purpose. The Söderberg & Partners Wealth Management Junior ISA managed by SCL is a stocks and shares JISA.

If you do not already have a Söderberg & Partners Wealth Management Junior ISA (JISA) you will need to apply for one before submitting this form.

Please send this form once completed and signed to our central mailbox servicecentre@soderbergpartners.com and support@seccl.tech

**Please note:** we will not accept cheques or postal forms.

Your details

|  |  |
| --- | --- |
| Title (if any) |  |
| Full name |  |
| National insurance number |  |
| Date of Birth |  |
| Email address |  |
| Sort Code (if applicable) |  |
| Permanent residential address |  |
| SPWM account number |  |

I apply to transfer a JISA for:

|  |  |
| --- | --- |
| Child’s title (if any) |  |
| Full name |  |
| National insurance number (if available) |  |
| Child’s Date of Birth |  |
| Sort Code (if applicable) |  |
| Child’s permanent residential address |  |
| SPWM account number |  |

JISA Transfer Authority

|  |  |
| --- | --- |
| Current JISA provider |  |
| Current JISA account number |  |
| Type of JISA with current provider (cash or stocks and shares?) |  |
| Amount to transfer (if partial)  |  |
| In-specie or cash (if partial, please list assets to transfer) |  |
| Value of current year subscriptions to be included in the transfer |  |

Declaration

I declare that

* I have read and understood the Söderberg & Partners Wealth Management JISA terms and key feature document
* I am the child or I have parental responsibility for that child
* I am the registered contact for the JISA
* I give authority to the Söderberg & Partners Wealth Management and the ISA manager (Seccl Custody Ltd) to transfer my ISA
* Information that provided in this application is correct to the best of my knowledge. I will notify the Söderberg & Partners Wealth Management of any changes to the information provided.
* (For transfers from Cash JISAs only) I understand that the Cash JISA I am transferring is to be transferred into the Söderberg & Partners Wealth Management stocks and shares JISA.
* I accept that the Söderberg & Partners Wealth Management will not be liable to any losses incurred as a result of any delays in the transfer to the Söderberg & Partners Wealth Management JISA.

Transfer Instruction

I hereby authorise my existing ISA provider to:

* Transfer my existing JISA as specified to Söderberg & Partners Wealth Management
* Provide any information necessary to the Söderberg & Partners Wealth Management to facilitate the transfer
* Cancel any direct debits currently in place with immediate effect if I have chosen to transfer my current tax years subscriptions
* Deduct any charges for the transfer as specified within your terms and conditions

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Parent’s/guardian’s name |  |
| Date |  |
| Parent’s/guardian’s signature |  |

Transfer Acceptance

For the attention of the ceding provider.

Please make the payment to the following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 308012

Payment Reference: [Firm ID] – [SPWM Account ID]

Please note, we do not accept payment by cheque.

Please send all correspondence relating the transfer to servicecentre@soderbergpartners.com and transfers@seccl.tech, including the investor’s contributions from this tax year for HMRC reporting purposes.