

Changing your Child Investment Account to a Stakeholder Account

We want to make it as easy as possible for you to have the right type of account for your child's CTF. Due to the requirements that relate to the opening of a new account, however, we do need to ask you to complete this form as if it were a fresh application.

Your account number will remain the same but because your account change is treated as a new application you will have 14 days in which to change your mind; during this time you can continue to use your existing account, including adding new money and making new purchases. If you've any questions do call, we'll be pleased to help.

Section 1: Registered Contact's details

Title	<input type="text"/>	Customer ref.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Forenames	<input type="text"/>	Permanent residential address	<input type="text"/>
Surname	<input type="text"/>		
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Telephone	home	<input type="text"/>	
	work	<input type="text"/>	
Email	<input type="text"/>	Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Section 2: Child's details

I apply to open a Stakeholder CTF Account for:		If the child's Permanent residential address is the same as the Registered Contact's details above please tick here <input type="checkbox"/>	
Master/Miss	<input type="text"/>	otherwise please enter details below:	
Forenames	<input type="text"/>	Permanent residential address	<input type="text"/>
Surname	<input type="text"/>		
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
CTF Unique ref no.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Customer reference	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Account no.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		

Section 3: Managing your CTF Account

Your existing memorable name/word and memorable date will continue to apply to your new account.

If you wish to change these details please let us know.

Internet access: You can continue to use your existing Internet password with your new account.
 If you do not already have a password please tick here and we will send one to you.
 Please ensure you have supplied a valid email address.

Section 4: Investment instructions

Your new Stakeholder CTF account invests only in the Legal & General UK Index Trust; therefore, any other investments currently in your Child Investment Account will, on expiry of your 14 day cancellation period, and once all outstanding sales, purchases and credits to your account have been completed, be sold as soon as is practicable at the market 'best price'. The sale proceeds will then be re-invested into this Legal & General Fund as at the next dealing date. To avoid any investments other than the Legal & General Fund being purchased during this 14 day period, you authorise us to change any existing Regular Investment Service instructions to buy units in the Legal & General with immediate effect.

You may contribute up to a total of £1,200 each year, either by regular monthly contributions or by way of 'one-off' payments from time to time.

When your child reaches 13, your Stakeholder CTF investments will be changed in order to protect the value you have built-up, though this may mean a reduction in the growth of the Fund; this is a process referred to by the Government as 'lifestyling'. You have the option to opt-out of this process and we will contact you at the appropriate time for your instructions.

Section 5: Declaration and Authority

I apply to change the Child Investment Account detailed in Section 2 to a Stakeholder CTF Account. On expiry of my 14 day cancellation period, and once all outstanding sales, purchases and credits to my account have been completed, please open my Stakeholder CTF Account and transfer any existing Legal & General UK Index Trust investments and any cash balance from my existing Child Investment Account. Where my existing account also has other investments, I authorise The Share Centre to sell these investments at 'best' according to its Terms and Conditions and to invest the proceeds, after deduction of dealing commission and any statutory charges, into the Legal & General UK Index Trust at the next dealing date.

All future subscriptions, including any government contributions, income and any other cash balances received are to be invested into the Legal & General UK Index Trust. Where a Regular Investment instruction is already in place I authorise you to amend the investment instructions so that all monies are also invested into the Legal & General UK Index Trust.

I declare that:

- I am 16 years of age or over;
- I have parental responsibility for the child;
- I am, and will continue to be, the registered contact for the CTF.

I authorise The Share Centre:

- 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 declare that the above information is true and correct. I will notify The Share Centre without delay of any circumstances or changes affecting the information given on this form. I agree to be bound by The Share Centre's Terms of Business and Tariff. My signature below confirms all statements and instructions on this form, including investment instructions in Section 4 and I confirm I have received, read and understood the Key Features of the Legal & General UK Index Trust.

Signature of
Registered Contact

Date

The Share Centre provides a wide range of services to its customers and we will inform you about them from time to time without any obligation on your part. If you prefer not to be kept up-to-date by The Share Centre, please tick the box.

Please check that you have completed all sections as incomplete details may delay the opening of your Account and any associated purchases.

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