thesharecentre:

Changing your Stakeholder Account to a Child Investment 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 the 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

Mr/Mrs/Ms/Miss/Other

Forenames

Surname

Date of birth D D M M Y Y Y Y

Telephone home

work

Email

Customer reference

Permanent residential address

Postcode

Section 2: Child's details

I apply to open a Child Investment Account for:

Master/Miss

Forenames

Surname

Date of birth D D M M Y Y Y Y

CTF Unique ref no.

Customer reference

Account no.

If the child's Permanent residential address is the same as the Registered Contact's details above please tick here otherwise please enter details below:

Permanent residential address

Postcode

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 existing Legal & General UK Index Trusts investments will be transferred to your new Child Investment Account and you will now have the option to continue investing in this fund, or to choose other investments. You can invest up to £1,200 each year and to help you decide where to invest for the best prospects, advice and information on UK shares is freely available from The Share Centre's Advice Team upon completion of an Advice Registration form.

Future investments: to make it easier and quicker for you to invest money you pay in to your child's account, please tell us how you would like us to invest future contributions. If you would like to pay money into your account by direct debit each month, please complete a separate Monthly Investing form.

Please invest all money received into: (tick one box only)

☐ Investment | Preferred Fund or name of Company/Fund

I understand this will be my 'standard investment' into which any cash balance will be invested on the 23rd of each month (or next working day) under the Automatic Investment arrangements, and that I can change it at any time by contacting The Share Centre with new instructions.

☐ Hold as cash for me to invest when I choose.

Please note: we will invest your money in accordance with your instructions at the times shown on the accompanying Information and Tariff form. I When choosing to invest in Funds, including The Share Centre's Preferred Funds, please ensure you read the Key Features.

Section 5: Declaration and Authority

I apply to change the Stakeholder CTF Account detailed in Section 2, to a Child Investment 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 Child Investment Account and transfer all existing investment and any cash balance from my existing Stakeholder CTF Account.

I have indicated above how future subscriptions, including any future government contributions, income and any other cash balances received are to be invested. Where a Regular Investment instruction is already in place this is to continue until such time as you receive new instructions from me.

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 HM Revenue & Customs 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 Funds for which I have authorised purchases.

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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