



Company name:

Advised sale: Yes No

Original policy to client copy to adviser or

Original policy plus copy to adviser

Child Trust Fund

External transfer

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

To (name of new provider)

A Child's details

1 Forename(s)

2 Surname

3 Date of birth

4 Male Female

5 Address

Postcode

6 URN (Unique Reference Number)

B Registered contacts personal details

1 Mr/Mrs/Ms/Miss/Other 2 Male Female 3 Relationship to Child

4 Forename(s)

5 Surname

6 Address

Postcode

7 Email

C CTF details

1 Account number (of old provider)

2 Date of transfer

3 Total subscriptions in subscription year to date of transfer (£)

4 Total government contributions outstanding (£)

5 Total subscriptions in previous subscription year amount (£)

6 Details of investments transferred

D Declaration

I declare that:

- I have fulfilled all my obligations to the child, the Board of HM Revenue and Customs or otherwise, which are imposed by the CTF regulations;
- I have transferred to you or your nominee any CTF investments, including cash, which are being transferred by virtue of the transfer of this CTF and, if appropriate, I have taken the necessary steps to ensure that the CTF investments can be registered in your name or the name of your nominee; and
- I will forward any further payment received in respect of these CTF investments, including cash, to you on receipt.

Signed

Date

The Shepherds Friendly Society Limited Registered Office: Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL.

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The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.