

Matured Child Trust Fund to Lifetime ISA transfer form

This form lets you transfer a matured Child Trust Fund (CTF) to a Stocks and shares Lifetime ISA with AJ Bell.

If you don't already have an AJ Bell Lifetime ISA you'll need to apply for one using our online application process before completing this form.

If you want to transfer a matured CTF to a Stocks and shares ISA, don't complete this form – instead complete the 'Matured Child Trust Fund to ISA transfer form'.

You can only transfer cash (not investments) from a matured CTF to your AJ Bell Lifetime ISA, and the maximum you can transfer is the annual Lifetime ISA allowance of £4,000. But this will be reduced if you've made payments to your Lifetime ISA (or transferred in from other types of ISA) this tax year. You are only allowed to pay into one Lifetime ISA each tax year.

Once the transfer from your matured CTF is complete, you can withdraw money free of charge once you've reached age 60, if you're buying your first home, or if you're terminally ill. If you withdraw under any other circumstances, you will pay a government withdrawal charge of 25% - which could mean you get back less than you put in.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at help@ajbell.co.uk.

When your transfer form is signed and completed, please scan and email it to transfersin@ajbell.co.uk.

Or if you prefer, you can post the completed form to us at:

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

If you email us your transfer form, we may later need you to post us a paper copy with a wet signature. If this is the case – and it'll depend on the provider you're transferring from – we'll be in touch to let you know.

Personal details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Date of birth

National Insurance number

Permanent residential address

Postcode

Country

Daytime telephone number

Email address

AJ Bell Lifetime ISA account number

Please ensure that your personal details held with the provider you're transferring from match the above as differing details may delay your transfer.

Declaration

I declare that

1. I confirm that the information provided in this form is to the best of my knowledge and belief, correct, complete and not misleading.
2. I understand and accept that AJ Bell Securities Limited accepts no responsibility for any losses that may arise as a result of any delays in the transfer to my AJ Bell Lifetime ISA.
3. I understand that the cash I am transferring will be transferred into a stocks and shares Lifetime ISA.
4. I understand that once my Matured CTF has moved to AJ Bell, I won't be able to cancel the transfer or return the cash to my previous provider .

Please print your name, sign and date below to confirm you have read and understood the above declarations. You'll also need to sign the transfer authority section below.

Name

Date

Signature

CTF transfer authority

Please confirm the transfer you wish to make (please tick one box):

Approximate transfer value £ This is a full transfer This is a partial transfer

CTF provider's name

CTF unique reference number

I authorise the CTF provider I've stated above to transfer my matured CTF to AJ Bell.

I authorise my CTF provider specified above to provide AJ Bell or AJ Bell Securities Limited with any information they request regarding my CTF above. I agree that a copy of this authority should have the same validity as the original.

I confirm that I have not received any advice or recommendation in relation to the transfer from a representative of AJ Bell or AJ Bell Securities.

Name

Date

Signature