thesharecentre:
simply easier

change 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.

Section 1: Applicant's details (Registered Contact)

Title
Surname
Customer reference
Forename(s)
Date of birth
Nationality
Country of birth
Phone
Mobile
Email
You **must** enter a valid email address if you wish to access your account online.
Permanent residential address
Postcode

If you do not already have a memorable word please enter one here, with a minimum of 8 characters (not your name).

Section 2: Child's details

I apply to open a Child Investment Account for:

Title
Surname
Date of birth
Forename(s)
CTF Unique ref no.

Section 3: Dealing option

See costs sheet
Standard (default)
Frequent

Section 4: Managing your account

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. Please complete section 5 overleaf with your purchase instructions if appropriate.

Income: (tick one)

- left in the account as cash (default)
- re-invested into the same company that paid the dividend

If you have not already set up Regular Investing and would like to pay money into your account by direct debit each month, please complete a separate Regular Investing form.

Section 5: Purchase instruction(s)

Name of investment	Limit price (if applicable*)	Monitoring period (max 365 days)	Amount to Invest
	p		£
	p		£
	p		£
	p		£
	p		£
	p		£
	p		£
	p		£
	p		£
	p		£
	p		£

*When investing in funds you cannot set a limit price.

If you do not include any purchase instructions your account will remain in cash, all future money paid in will also require purchase instructions.

Section 6: Declaration and authorisation

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.

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 will be the registered contact for the CTF.

I authorise The Share Centre Ltd:

- 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.
- 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 5. If I have chosen to invest in funds I confirm that I have read, understood and retained the Simplified Prospectus or Key Features Document(s) for the specific fund. My signature confirms all the statements and instructions on this form and any share purchase instruction(s) as applicable.

Signature

Date

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