Shepherds FRIENDLY
Providing Financial Security Since 1826

Child Trust Fund

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Shepherds Childs Trust Fund

Transfer Application

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Applicant's details

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

4 Forename(s) **5** Surname

6 Address

Postcode

B I apply to transfer a CTF for: please complete Child's details

1 Forename(s) **2** Surname

3 Date of birth **4** Male ☐ Female ☐

5 Address (if different from above)

Postcode

6 URN (Unique Reference Number shown on voucher)

7 Current CTF provider

8 Type of CTF with the new provider **stakeholder**

C Declaration

I declare that:

- I am 16 years of age or over.
- I am the child named on the voucher/I have parental responsibility for that child (delete which does not apply).
- I am the registered contact for the CTF.

I authorise (providers name)

- To hold the child's HM Revenue and Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- To make on behalf of the child any claims to relief from tax in respect of CTF investments.

I agree to the CTF terms and conditions.

Signed Date

The Shepherds Friendly Society Limited
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THE SHEPHERDS FRIENDLY SOCIETY IS INCORPORATED UNDER THE 1992 FRIENDLY SOCIETIES ACT NO.240F. AUTHORISED AND REGULATED BY THE FINANCIAL SERVICES AUTHORITY.
The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.