

**Freepost
IDEALING.COM LTD**

Self-Select JISA Transfer Form

If you wish to transfer an existing JISA to iDealing, you will first need to register online for a JISA account and then complete and return this form to the Freepost address above.

Please note that in order to transfer an existing JISA, the current ISA Manager may require you to liquidate the existing holdings and transfer the resulting cash proceeds. The ISA Manager will be able to tell whether this is the case. We are unable to accept unit trusts, or stocks and shares that are in liquidation and/or Crest ineligible.

Registered Contact Details including your permanent residential address

Name	Title	Forename(s)	Surname
Address			
Address			
Address			
Town/County			Postcode
Telephone			

Child's Contact Details including their full permanent residential address

Name	Title	Forename(s)	Surname
Address			
Address			
Address			
Town/County			Postcode
Telephone			Date of Birth
Does the Child have an existing JISA iDealing Account?			
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
If Yes, existing Account No.			

Does the Child have a National Insurance (NI) Number?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	If Yes, you must enter it here

Existing JISA Subscriptions Details

Date of first subscription (if any) in this tax year (dd/mm/yyyy)	Total subscriptions from 6 th April to date (if any)					
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; height: 20px;"></td> <td style="width: 20%; height: 20px;"></td> <td style="width: 20%; height: 20px;"></td> <td style="width: 20%; height: 20px;"></td> <td style="width: 20%; height: 20px;"></td> </tr> </table>						£

Existing JISA Manager Account to be transferred to iDealing.Com Ltd

Account Name	Account No.
ISA Manager Name and Address	

Transfer Details

(Print off again for continuation sheet if required)

Transfer will be coming from a:			
CASH JISA		STOCKS & SHARES JISA*	

***Only stocks eligible to be held and traded in an iDealing account can be transferred. Any non-eligible holdings must be sold by your existing JISA Manager and the resulting proceeds of sale transferred as cash.**

Stocks to be transferred		
Quantity	Stock name	Description
<i>e.g. 100</i>	<i>Barclays plc</i>	<i>Ordinary 25p</i>

Cash to be transferred (payable to iDealing.Com Ltd)	
State 'ALL' for full cash balance transfer	£ / ALL

Instruction to Existing ISA Manager

I wish to transfer the above mentioned JISA account to iDealing.com Limited with immediate effect.

I authorise you to;

- Provide iDealing.com Limited with any information required to effect the transfer.
- Act upon any instructions form iDealing.com Limited.

You authorise iDealing.Com Ltd to;

- Hold the Child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- Make on the Child's behalf any claims to relief from tax in respect of JISA investments.

You declare that;

- All subscriptions made, and to be made, the Child is the beneficial owner.
- You are 18 years of age or over and have parental responsibility for the Child.
- You are the registered contact for the Child.
- The Child is resident and ordinarily resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a civil partnership with a UK Crown servant.
- You confirm that the Child does not have a Child Trust Fund (CTF) account. You have not subscribed and will not subscribe to another JISA of this type for this Child.
- You are not aware of other JISA subscriptions that will result in this Child exceeding the annual limit.
- You will not knowingly make subscriptions to JISA's for this Child that will result in the subscription limit being exceeded.

By signing below, you confirm that you have read, understood and accept our Terms and Conditions and Services and Prices found on our website: www.iDealing.com.

I declare that this application form has been completed to the best of my knowledge and belief.

Signed (Registered Contact)	Date