



ISA

Application to transfer a Matured Child Trust Fund into an ISA with myM&G

This form can be used to:

- transfer your Matured Child Trust Fund from another provider to an ISA with myM&G as previous tax year contributions. The Child Trust Fund must have matured (you must be 18 years or over) for this transfer to take place.

Important Information:

- **Before you sign this form:** you should read an up-to-date version of your chosen fund's 'Key Documents': Key Investor Information Document (KIID), Prospectus and, for funds with sustainability characteristics or with a sustainability label, the Consumer-Facing Disclosure (CFD). You should also read the myM&G Terms and Conditions. These provide you with information about your investment, including details about the fund's different share classes: be sure to choose the appropriate one for you.

They also explain fund charges, including the ongoing charge, a deduction from your fund which M&G makes to cover the costs of investment management and administration. Additional fund information can be obtained from the Costs and charges illustration, and Annual or Interim Fund Reports.

- All literature will be provided in English.

Before you invest:

- If you are unsure about the suitability of your investment, speak to your financial adviser.
- Please register with myM&G at mymandg.co.uk/register before sending us your completed form.

Please complete this form in blue or black ink, using CAPITAL letters and ticking the appropriate boxes.

1 Personal details

Mr Mrs Miss Ms Other

Forename(s)
Surname

Permanent residential address

Postcode

Date of birth

D	D	M	M	Y	Y	Y	Y
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Phone: Home
Mobile
Email

Tick here if you're not eligible for a National Insurance number

National Insurance Number

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Please provide details of the bank account that you will always use for myM&G. This will become your nominated bank account.

Please visit gov.uk/find-national-insurance-number to find or apply for a National Insurance number.

Name and full postal address of your bank or building society

Bank or building society

Address

Postcode

Bank or building society account number

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Branch sort code

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Name(s) of account holder(s)

2 Selecting your ISA

I apply to subscribe to a Stocks and Shares ISA with myM&G

3 Your new investment details

The transfer from your Matured Child Trust Fund to a Stocks & Shares ISA with myM&G will be treated as a previous tax year contribution.

Please specify your choice of fund(s) and the proportion of the amount to be transferred that you wish to invest against the fund(s) of your choice.

Stocks and Shares ISA Full name(s) of fund(s) chosen	Proportion of the amount transferred Must total 100%
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %

Note: Please use another sheet of paper if you need more space to list your choice of funds.

- If you don't want to choose your funds now, we can put the proceeds from your Matured Child Trust Fund into the ISA Cash Park. You can then log in to myM&G to make your investments as soon as you are ready. Your money won't earn you any interest whilst it is deposited in the Cash Park so it should only be a temporary home whilst you decide which fund(s) to invest in. To put your proceeds into the ISA Cash Park, please tick this box.

4 Data Protection and Privacy

We collect personal data from you for the purposes of administering your investment.

At M&G we are committed to protecting your privacy. To learn more about how we process your personal data please refer to our Privacy Notice which can be accessed by logging in to myM&G, going to 'My account' at the top of the page and then selecting 'Privacy notice and marketing preferences' from the menu.

5 Declaration and authorisation

I declare that:

I wish to transfer my Matured Child Trust Fund to M&G Securities Limited. All subscriptions made, and to be made, belong to me. I am 18 years of age or over. I have not subscribed, and will not subscribe, to more than the overall ISA subscription limit total in the same tax year, nor to another Stocks and Shares ISA managed by M&G Securities Limited. I am a resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or you are married to, or in a civil partnership with, a person who performs such duties. I will inform M&G Securities Limited promptly of any changes in my circumstances which affects any of this information.

I have read an up-to-date version of the Key Investor Information Document(s) and myM&G Terms and Conditions.

I authorise M&G Securities Limited:

- To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash
- To make on my behalf any claims to relief from tax in respect of ISA investments.

Signature

Date

! Returning your form


Please send all three pages of your completed application form to: **myM&G, 1 Tanfield, Edinburgh, EH3 5DA.**

Checklist


- Are you registered with myM&G?
- Have you read, signed and dated the Declaration and authorisation?
- Have you completed The Matured Child Trust Fund Transfer authority, to enclose and return with this application?

How to contact us

Secure message

 Please log in to your online account and contact us by 'secure message'. This service is secure and will ensure your personal details are kept safe.

Chat

 Use our online 'Chat' service to speak directly to a member of our Investor Services team.

The Matured Child Trust Fund

Transfer authority



This form provides transfer authorisation to your current Matured Child Trust Fund (CTF) manager.

Please complete this form in blue or black ink, using CAPITAL letters and ticking the appropriate boxes.

1 Current Matured Child Trust Fund manager's details

Name	Unique CTF Reference Number
Address	Estimated Matured CTF value
	£
Postcode	
Country	

2 Your investment details

The full balance of your Matured CTF account will be transferred into a Stocks and Shares ISA with myM&G or into the ISA Cash Park with myM&G.

If your Matured CTF contains M&G funds that you would like to transfer in specie (as they are, without selling them), tick this box.

3 Declaration and authorisation

I authorise you as the current Matured CTF manager to:

- Give M&G Securities Limited full details of the Matured CTF
- Immediately sell the Matured CTF investment as indicated on receipt of this form and send the proceeds (including uninvested cash that applies to the Matured CTF I am transferring) to M&G Securities Limited by bank transfer:

Sort code: 60-00-01 **Bank account:** 45754861 **Bank account name:** M&G SECURITIES LIMITED TRANSFERS CLIENT MONEY

Payment reference number:

If you are unable to send the proceeds by bank transfer, please send a cheque to **myM&G, 1 Tanfield, Edinburgh, EH3 5DA.**

- Transfer money or rights and entitlements subsequently received, in respect of the Matured CTF I am transferring, including any distributions and tax credits to M&G Securities Limited as soon as possible.

Full name	
Signature	Date
	D D M M Y Y Y Y

! Returning your form

Important: do not send this form to your current Matured CTF manager. MyM&G will arrange the transfer of your Matured CTF directly with your current Matured CTF manager.

Please return all three completed pages to us at **myM&G, 1 Tanfield, Edinburgh, EH3 5DA.**