

# Transfer Authority form

## Junior Individual Savings Account (JISA)



This form authorises your current JISA manager to transfer your JISA to Reyker. Your JISA manager might ask for a separate form for each JISA you have with them. If you have different ISA managers, you must complete a transfer authority form for each transfer request.

If you are an existing Reyker client, please enter your **account number** here:

All fields need to be completed.

Please complete in ink and return to:  
**Reyker, 17 Moorgate, London, EC2R 6AR** with  
your JISA application form (for new clients only)

### 1. Registered contact

Title	Permanent address	
First name		
Middle name(s)		
Surname	County	Postcode
Date of birth	Country	
National insurance number:		
□□ □□ □□ □□ □		
<input type="checkbox"/> Tick here if you do not have a national insurance number		

### 2. Child's details

Title	Permanent address (if different from registered contact)	
First name		
Middle name(s)		
Surname	County	Postcode
Date of birth		

### 3. JISA Manager Details (Required)

Existing JISA manager's name	Address of JISA provider	
JISA account number		
	County	Postcode
Type of transfer	Full <input type="checkbox"/> Partial <input type="checkbox"/>	

#### 4. JISA transfer details (complete section A & B as applicable)

Tick as appropriate

##### Section A

- I wish to transfer my cash JISA £ \_\_\_\_\_
- I wish to transfer my Stock and Shares JISA
- Please sell all holdings and transfer as cash
- Please re-register my holdings to Reyker

##### Section B

- Full JISA transfer (current and previous years subscriptions) £ \_\_\_\_\_
  - Partial JISA transfer (please specify amount) £ \_\_\_\_\_
  - Current year subscription only (must be the full current year subscription) £ \_\_\_\_\_
- How much have you already subscribed in this year's JISA allowance? £ \_\_\_\_\_

Please note that under HMRC rules, you cannot transfer just a part of your current tax year JISA.

#### 5. Transfer authority and instruction to my existing JISA manager as per section 3

- I authorise you to provide Reyker with any information about my JISA and to accept any instructions from them relating to the JISA being transferred.
- If I am transferring a Stocks & Shares JISA and my holdings need to be re-registered, I authorise the JISA manager to sell any holdings that cannot be re-registered for whatever reason, and to transfer the cash proceeds to Reyker Securities plc.
- I authorise you to transfer any cash proceeds by BACS to **Reyker Securities plc, sort code 60-00-01, account number 36210633, quoting my full name as the reference.**
- Please transfer my JISA once instructions have been received from Reyker to do so. After transfer, all dividends and tax credits should be made payable directly to me.

Investor signature \_\_\_\_\_

Investor printed name \_\_\_\_\_

Date \_\_\_\_\_

For our reference: CS/SK/DD/VM  
Last Updated: 10.12.2018  
Next Update: 10.12.2019  
Owner: Client Services