

## JISA Transfer Authority

Office Use Only	
WCIM A/C NO:	

Please complete this form using **BLOCK CAPITALS** and return to Walker Crips Investment Management, ISA Transfers, St James House, 27-43 Eastern Road, Romford Essex, RM1 3NH.

<b>To: (Your existing Plan Manager)</b>	
<b>Manager's Address:</b>	<b>Postcode:</b>
<b>Telephone Number:</b>	
<b>Stocks and Shares JISA Ref. No(s):</b>	
<b>Cash JISA Ref. No(s): (Transfer to Stocks and Shares)</b>	
<b>Child's Name:</b>	
<b>Child's National Insurance No: (If applicable)</b>	
<b>Child's Date of Birth:</b>	
<b>The Transfer to be in the form of: (Please tick the appropriate box)</b>	<input type="checkbox"/> Re-register shares with any cash balance <input type="checkbox"/> Transfer my cash ISA in full
	<input type="checkbox"/> Sell the shares and transfer the whole ISA as cash <input type="checkbox"/> Transfer part of my ISA (as detailed below):

I hereby authorise you to transfer forthwith the above Plan(s) to Walker Crips Investment Management Limited, a Her Majesty's Revenue and Customs (HMRC) approved Plan Manager, and I authorise you to provide Walker Crips Investment Management Limited with all such relevant information relating to my Child's Plan(s) as may be required.

<b>Registered Contact Name: (Parent/Guardian)</b>	
<b>Address:</b>	<b>Postcode:</b>
<b>Date (dd/mm/yy):</b>	
<b>Signature:</b>	