

Aegon Junior ISA transfer authority (Stocks and Shares)

In this form, 'I', 'me', 'you', 'your' or 'my' refers to you, the registered contact named in section 1, and 'Aegon', 'we' or 'our' refers to Cofunds Limited.

Use this form to make a transfer from a Junior ISA (JISA) with another JISA account manager into an Aegon JISA.

Important

You must send this form along with a completed and signed Junior ISA transfer application form.

If you're transferring from more than one JISA account manager, you'll need to send a separate transfer authority for each transfer.

Please ensure that you have signed both the application form and the transfer authority.

All the details must match those held by the existing JISA account manager. Any differences could cause delays to the requested transfer.

Please complete this form in BLOCK CAPITALS and ballpoint pen and return it to: Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB.

1. Investments that you wish to keep via re-registration (stock transfer)

Where investments that are held with the existing account manager named on this authority are available for investment within the Aegon JISA you can choose to transfer those investments by re-registration without first selling the investments.

Please list all investments held with the JISA account manager named on this authority that you wish to retain in this way when you transfer the investment to Aegon. Please ensure the investments you choose are available through Aegon and are compatible with your investment service. For more details of your investment service please see the Aegon Platform terms and conditions.

Please note that you must transfer the full value of another stocks and shares JISA and may not transfer only part of it.

Full investment manager name and investment name	Sedol code (this is shown in your Key Investor Information Documents (KIIDs))	Account or plan numbers (this must be completed)

2. Investments that you wish to sell (stocks and shares JISA cash transfer)

Where investments that are held with the existing account manager named on this authority are not available for investment within the Aegon JISA or you wish to transfer cash from the existing JISA to the Aegon JISA, you may instruct the existing account manager to sell those investments into cash before transfer into the Aegon JISA.

Please list all investments held with the JISA account manager named on this authority that you wish to sell into cash and transfer to Aegon. Please also complete section 2 of the Junior ISA transfer application form to tell us which investments you'd like to reinvest into.

Sell all my investments

Full investment manager name and investment name	Sedol code (this is shown in your KIIDs)	Account or plan numbers (this must be completed)

3. Cash JISA transfer

If applicable, please indicate either of the following to be transferred into your Aegon JISA.

All my cash or An amount of the cash JISA

Please state the notice period (if any), for you to transfer the cash Junior ISA days

Account number (this must be completed)

Please also complete section 2 of the Junior ISA transfer application form to tell us which investments you'd like to reinvest into.

4. Authorisation

Aegon JISA number

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I authorise the JISA account manager named below on this authority to re-register the investments detailed in section 1 and transfer the investments in section 2 in cash when requested to Cofunds Nominees Ltd with immediate effect or where I so instruct at the end of a notice period, and forward the proceeds as specified below to the new Aegon ISA account manager at: Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB, and provide Aegon with any information reasonably required by them to allow them to accept this transfer.

Full forename(s)

Surname

Date

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Signature

Name of existing JISA Account Manager

Permanent home address

Postcode

