

# Transfer In Form

## Child Trust Fund

Once you have decided to transfer your child's Child Trust Fund to Healthy Investment please complete this application form and return it to Healthy Investment, 2 The Old Court House, Tenterden Street, Bury, BL9 0AL. If you have any questions about completing this form please telephone us on 0161 762 5790.

PLEASE USE BLOCK CAPITALS TO COMPLETE THE FORM

**THIS FORM IS DOUBLE SIDED, PLEASE SIGN THE DECLARATION ON THE REVERSE**

### CHILD'S DETAILS

I apply to transfer a CTF for:

Title:	Address:
Surname:	
Forename(s):	Town:
Date of Birth:	County:
Child's Unique Reference Number:	Post Code:

### YOUR DETAILS

The person with parental responsibility for the child

Title:	Address:
Surname:	
Forename(s):	Town:
Date of Birth:	County:
Daytime Tel No.	Post Code:
Evening Tel No.	Email:

### CURRENT CTF PROVIDER'S DETAILS

Name of Current Provider:	Address:
Account Number:	

Tick one box only

Please transfer the above CTF Account to a Healthy Investment Stakeholder CTF

Please transfer the above CTF Account to a Healthy Investment Non-Stakeholder CTF

## GENERAL DATA PROTECTION REGULATION

The General Data Protection Regulation (GDPR) requires us to provide you with a Privacy Notice. You can obtain a copy from our website at [www.healthyinvestment.co.uk/privacy-notices](http://www.healthyinvestment.co.uk/privacy-notices) or you can request a copy to be sent by post by telephoning the office on 0161 762 5790. The information you provide us with will be held by Healthy Investment. It will be used for setting up and administering your policy. Some information from credit reference agencies may be used to establish your identity in accordance with anti-money laundering rules. We may be required by law to disclose information regarding you or your policy to the regulatory authorities. If you have been introduced to Healthy Investment by an Introducer, we will notify them that your policy has gone live and of any subsequent cancellation. We will not share any other information with them. If you have arranged this policy through a financial adviser, we will share information with the adviser on the performance of your policy unless you tell us otherwise. If you have provided your email address, Healthy Investment will send you information regarding this investment and the governance of the Society by email. If you do not want to receive this information by email then please let us know. If you would like to receive our regular newsletter by email and other emails which, under GDPR, would be classed as marketing emails, then you need to give us consent to send them.

I consent to receiving these emails from Healthy Investment.

You can stop receiving these emails at any time by clicking the unsubscribe link at the bottom of the emails we send or by contacting the office. We will only send you occasional emails and we will not share your data with any other companies to market their products to you. We may record your telephone calls with us for training and compliance purposes.

## DECLARATION AND SIGNATURE

I apply to transfer a Child Trust Fund for the child named above

I declare that:

I am 16 years of age or over;  
I have parental responsibility for the child;  
I am the registered contact for the Child Trust Fund.

I authorise Healthy Investment:

To hold the child's HM Revenue & Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;  
To make on the child's behalf any claims to tax relief in respect of CTF investments.

I have received the Terms and Conditions and understand the importance of these documents. I agree to the terms and conditions of the Child Trust Fund I am investing in.

Signature

X

Date

/ /

**HealthyInvestment**  
ethical investments since 1835

Healthy Investment

2 The Old Court House, Tenterden Street, Bury, BL9 0AL.

Tel: 0161 762 5790 Fax: 0161 764 3557

Email: [enquiries@healthyinvestment.co.uk](mailto:enquiries@healthyinvestment.co.uk)

[www.healthyinvestment.co.uk](http://www.healthyinvestment.co.uk)

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