

OFFICE USE ONLY	Member No	Policy No	Prop No	Proposal Input
PFA/IFA	Introducer	Date of Entry	Date of Maturity	Policy Doc Input
				New Bus Doc Chkd

RED ROSE ASSURANCE
Making Mutuality Meaningful

I apply to transfer the CTF/Junior ISA noted on this form and to open a Red Rose Assurance JISA

Personal Details of CHILD

Please complete fully in block capitals

Title	Surname
Forenames	
Address	
	Postcode
Child's REF No (format AB123456C)	
Child's Date of Birth	

Personal details of APPLICANT

Title	Surname
Forenames	
Address	
	Postcode
Home Telephone Number	Date of Birth
Mobile Telephone Number	
Email Address	

I apply to subscribe to a Red Rose Assurance Stocks and Shares JISA for the tax year

And each subsequent tax year until further notice, in accordance with the Terms and Conditions

I wish to invest in the **ESG ISA** or **Shariah ISA** or **With profits ISA**

Information about the junior ISA or CTF you want to transfer.

Name of exiting Junior ISA or CTF provider

Address Of Current ISA or CTF provider

Name of exiting Junior ISA or CTF provider	
Address Of Current ISA or CTF provider	
Account Number or REF Number	Sort code (If applicable)

Have any subscriptions been made to this Junior ISA or CTF in this current tax year?

YES Total subscriptions made in current tax year. £ p

NO

Declaration

I declare that :

I am 16 years of age or over I am the child/I have parental responsibility for that child (delete which does not apply)

I am the registered contact for the CTF/JISA being transferred

The child is resident and ordinarily resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a civil partnership with a UK Crown servant

I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded

I authorise Red Rose Friendly Society Limited

a) to hold the child's subscriptions, JISA investment, interest, dividends and any other rights or proceeds in respect of those investments and cash and

b) to make, on the child's behalf, any claims to relief from tax in respect of JISA investments

I agree to the JISA terms and conditions and confirm that to the best of my belief the information of this form is true.

Signed

Date

General Data Protection Regulation (GDPR): We take your privacy seriously and will only use your personal data to administer the policy and provide products and services you have requested from us. Full details of our GDPR policy and the Privacy Statement can be found on the website. You must sign our GDPR Document before we can process your application.

This product meets the demands and needs of those who wish to invest a regular monthly amount and/or lump sum over the medium to long term (considered to be 5 years or more) in a child's name.

Please ensure that all questions are answered.

FOR OFFICE USE ONLY	
I Recommend that this proposal be accepted	<input type="checkbox"/> Yes <input type="checkbox"/> No
Reason	
Special terms & conditions	
Signed	Date

Exit Mode
Exit Date
Amount Paid
Claim No

The Red Rose Friendly Society Limited, Parkgates, 52a Preston New Road, Blackburn, Lancashire BB2 6AH

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Established 1863 Incorporated under The Friendly Societies Act 1992 Reg No. 43 Coll Authorised by the Prudential Regulation Authority

and regulated by the Financial Conduct Authority and the Prudential Regulation Authority