

Please use this form if you would like to transfer a Child Trust Fund (CTF) you hold with another plan manager to the F&C Child Trust Fund.

Please note, this form can only be completed by the Registered Contact.

Also, please note we are unable to accept any top-up payments to your Child Trust Fund until your transfer is complete. We will send you an opening statement and a top-up form once we have received the money from the transferring CTF plan manager.

Please contact our Investor Services Team on **0845 600 3030** or email us at investor.enquiries@fandc.com if you have any queries.

Please complete this form in block capitals and black ink.

Please return the form in the reply-paid envelope provided, or to:

F&C Plan Administration Centre,
Block C,
Western House,
Lynch Wood Business Park,
Lynch Wood,
Peterborough
PE2 6BP

Part 1 Child's details

I am transferring a CTF account for:

Child's gender

Child's first name(s) in full

Child's surname

Child's home address

Child's date of birth

Postcode

Child's unique reference number*

* The child's unique reference number was included in the original Government CTF voucher and should also be found on the annual CTF statement from your existing plan manager.

Part 2 Personal details (Registered Contact)

National Insurance number

Date of birth

Tick here if you have never been issued with a National Insurance number

Title (Mr/Mrs/Miss/Ms/Other)

First name(s) in full

Surname

Permanent residential address

Telephone (daytime)

Postcode

Email address

Tick here if you have not been allocated a postcode

Providing your telephone number will help us contact you quickly if there are any queries with this form.

I confirm that I am the Registered Contact with the Old Plan Manager and I will be the Registered Contact for this F&C Child Trust Fund

Part 3 Data Protection Act

F&C will use the information you give for administration, research and statistical purposes. Information provided by you will be held in confidence by the F&C Group and will not be passed on to any other product or service companies. Your details may be used by the F&C Group to send you information on other products and services they think might be of interest to you. If you would prefer not to receive such information, please tick the box below or contact the F&C Investor Services team.

I do not wish to receive such information.

Part 4 Investment details

You can transfer to either a shares account or a stakeholder account. Please therefore complete either section 4a or 4b, then go to part 5.

Part 4a Shares account

I wish to invest in an F&C Child Trust Fund - shares account

Please obtain an approximate transfer value from the Old Plan Manager and complete the percentage investment split ensuring that the overall total adds up to 100%.

If you select more than one fund, please ensure that the transfer value into each fund will be at least £100. If a percentage split is selected that would result in less than £100 invested in any fund, that amount will be invested into the default fund instead.

Please tick which trust is to be the default fund. This will be the trust used for investing extra contributions in the future, should we not receive specific instructions from the Registered Contact. Please note we are unable to accept any additional subscriptions until the transfer has been completed.

		% Amount	Default fund (tick one box only)
Core			
CTFBAT	British Assets Trust (ordinary shares)	%	<input type="checkbox"/>
CTFIGR	F&C Capital and Income Investment Trust (ordinary shares)	%	<input type="checkbox"/>
CTFINV	Foreign & Colonial Investment Trust (ordinary shares)	%	<input type="checkbox"/>
CTFICT	Investors Capital Trust (units)	%	<input type="checkbox"/>
CTFICTA	Investors Capital Trust (A shares)	%	<input type="checkbox"/>
CTFICTB	Investors Capital Trust (B shares)	%	<input type="checkbox"/>
Specialist			
CTFEAT	European Assets Trust (ordinary shares)	%	<input type="checkbox"/>
CTFSML	F&C Global Smaller Companies (ordinary shares)	%	<input type="checkbox"/>
CTFMANI	F&C Managed Portfolio Trust (income shares)	%	<input type="checkbox"/>
CTFMANG	F&C Managed Portfolio Trust (growth shares)	%	<input type="checkbox"/>
CTFUSSM	F&C US Smaller Companies (ordinary shares)	%	<input type="checkbox"/>
Alternative			
CTFCOMP	F&C Commercial Property Trust (ordinary shares)	%	<input type="checkbox"/>
CTFPEQ	F&C Private Equity Trust (ordinary shares)	%	<input type="checkbox"/>
CTFENT	Graphite Enterprise Trust (ordinary shares)	%	<input type="checkbox"/>
CTFPROP2	IRP Property Investments Limited (ordinary shares)	%	<input type="checkbox"/>
CTFHEDGE	Thames River Hedge+ (ordinary shares – £ class)	%	<input type="checkbox"/>
Total amount		100 %	<input type="checkbox"/>

Part 4b Stakeholder account

I wish to invest in an F&C Child Trust Fund - stakeholder account

Transfers into the stakeholder account will be invested in the F&C FTSE All-Share Tracker Fund.

F&C Management Limited

80 George Street, Edinburgh EH2 3BU

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