



Name of current CTF provider

Address/property number

Street

Town

Current CTF account number

Unique Reference Number (URN)

Child's date of birth

Child's full name

Your name

Name of current CTF provider											
Address/property number			and/or property name								
Street											
Town						Postcode					
Current CTF account number											
Unique Reference Number (URN)											
(This can be found on your welcome letter or statement)											
D	D	M		M		Y	Y	Y	Y		
Child's date of birth											
Child's full name											
Your name											

Please transfer this CTF account to a Legal & General Equity Stakeholder Child Trust Fund. I hereby authorise you to provide Legal & General with any information they may request in relation to the CTF account.

Signature

Date

D D M M Y Y Y Y

Please sign within the white box.

#### I declare that:

I apply to Legal & General (Portfolio Management Services) Limited to open a Legal & General Equity Stakeholder Child Trust Fund on behalf of the child named in this transfer request.

I understand that at any time the child may only hold one Child Trust Fund.

I declare that the information given in this transfer request form is true and correct to the best of my knowledge and belief.

I will inform you without delay of any changes in my circumstances affecting any of the information given on this form.

#### Important please read: Data protection

##### Use of your information

Legal & General takes your privacy very seriously. We use the personal information collected via this form and any other information that you provide to us ('your information') for the purposes of:

1. providing you with our products and services and dealing with your enquiries and requests;
2. administering your investment;
3. carrying out market research, statistical analysis and customer profiling; and
4. sending you marketing information (by post, telephone, email and SMS) about products and services of companies in the Legal & General group and of third parties whose products and services Legal & General offers to its customers.

By signing below, you agree to receive the information as described in 4 above, unless you tell us otherwise by ticking this box.

Given the global nature of our business, we may need to transfer your information to countries outside the European Economic Area in order to provide our services to you.

##### Disclosures

We will disclose your information to other companies within the Legal & General group of companies, regulatory bodies, law enforcement agencies, future owners of our business and suppliers we engage to process data on our behalf.

If you have been dealing with a financial adviser, we will give them information about your product and, where appropriate, provide them with other information about your dealings with us to enable them to give you informed advice.

Where you have been introduced to us by a bank or a building society, we will share your information with them to enable them to:

- (a) carry out market research, statistical analysis and customer profiling; and
- (b) send you marketing information about their products and services and products and services of companies in the Legal & General group and of third parties whose products and services Legal & General offers to its customers.

By signing below, you agree to receive the information as described in (b) above by post or telephone, unless you tell us otherwise by writing to Legal & General Retail Investments, BNY Mellon House, Ingrave Road, Brentwood CM15 8TG.

##### Access

You have the right to ask for a copy of your information in return for payment of a small fee. To obtain a copy of your information, please write to us at the above address.

I agree to the use of my information as set out above.

I understand that a copy of the Terms and Conditions, Simplified Prospectus and the completed form is available on request.

On behalf of myself and the child I accept that the Terms and Conditions form the basis of our agreement with Legal & General. I also declare that I am 16 years of age or over, I have parental responsibility for the child named on this transfer request and I am the registered contact for this Child Trust Fund (CTF).

I authorise Legal & General 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, and to make on the child's behalf any claims to relief from tax in respect of CTF investments.

I have read the declaration carefully.

Signature

Date

D D M M Y Y Y Y

Please sign within the white box.

## STAFF USE ONLY

### Basis of advice declaration

To meet Financial Services Authority regulatory reporting requirements, we must now record whether advice was given to your client regarding the sale of this product. Please tick the relevant box. Was advice given?

Yes  No

## OFFICE USE ONLY

Legal & General agent number

Branch prefix

Staff number (introduced or reported sales only)

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**Legal & General (Portfolio Management Services) Limited**  
Registered in England No. 2457525  
Registered office: One Coleman Street, London EC2R 5AA

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