



It's easy to complete the CTF registered contact application form

How to complete this application form

Section 1 complete your details, entering your address if different from the child's.

Section 2 complete the child's details.

Section 3 to make a payment into the child's account:

- **by Direct Debit** – state the amount and collection date in section 3. Complete your details on the Direct Debit instruction
- **by cheque** – make cheques payable to OneFamily, write the child's name and date of birth on the back and attach it to the form
- **by Direct Credit or Standing Order** – tick the box in section 3 and we'll send out the appropriate form
- **by Debit Card** – make one-off or regular payments by calling **0800 028 1113*** or by visiting **onefamily.com/ctf**

Section 4 choose to opt in or out of lifestyling – see Key Features for more information.

Section 5 sign and date the declaration.

Section 6 tick the appropriate boxes for data protection and post the form back to us in the FREEPOST envelope provided.

Section 7 read for more information on making regular contributions.

Direct Debit makes paying in easy

Simply read the Direct Debit Guarantee and then fill in the Direct Debit Instruction on the form. By completing the Direct Debit instruction the bank or building society can make monthly payments for the person paying in, direct from the appropriate account. This person can also check their payments on their bank/building society statement, to save them worrying about forgetting to make payments if, for instance, they are away on holiday.

Direct Debit Instruction

All account details required to complete the Direct Debit Instruction can be found in most cheque books.

1. Fill in the name and address of the bank/building society branch
2. Fill in the account name/s as printed on the cheque
3. Branch sort code can be found in the top right corner of the cheque
4. The account number should be filled in – this is usually printed on the right at the bottom of the cheque
5. Account holder's address: it is important that the address and postcode of the account holder is entered here
6. The Direct Debit Instruction should be signed and dated.

If you have any questions please call **0800 028 1113**.

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Engage Mutual Funds Ltd t/a Engage Child Trust will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Engage Mutual Funds Ltd t/a Engage Child Trust to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Engage Mutual Funds Ltd t/a Engage Child Trust or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society – If you receive a refund you are not entitled to, you must pay it back when Engage Mutual Funds Ltd t/a Engage Child Trust asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



Important

Please read these client and initial services agreements

Client agreement

I agree to be bound by this Client Agreement, which is a legal agreement, and defines our respective rights and obligations.

Your rights

You will be treated fairly in all of your dealings with OneFamily, including:

- the product and associated services will be clearly described, so that you can decide whether it meets your needs
- being provided with clear and accurate information, during and after the point of sale
- being provided with a product and associated services that perform to an acceptable standard and as we have led you to expect
- our dealing effectively with your queries and any complaints.

Your obligations

- To complete the application to the best of your knowledge and inform OneFamily in writing immediately of any changes in your circumstances
- To read the documentation that we will send to you, particularly the Key Features Document.

Our obligations

- We will treat you fairly in all of your dealings with OneFamily
- Our products and services will be designed to meet the needs of identified customer groups and will be targeted accordingly
- We will provide you with clear information and keep you appropriately informed before, during and after the point of sale
- We will ensure that you are provided with a product that performs as we have led you to believe, and the associated service will be both of an acceptable standard and as we have led you to expect
- We will deal effectively with your queries and any complaints.

Our rights

- We will rely on the application being completed to the best of your knowledge and you informing us immediately of any changes in your circumstances
- We will rely on you having read and understood the documentation that we will send to you, particularly the Key Features Document.

Initial services agreement

I declare that I enter into an agreement with OneFamily authorising it, once the contract has started, to:

- collect and accept payments into the policy/account from me or any other person
- invest payments in the way described in the Key Features Document
- to the extent that the investment is linked to units/shares, to invest payments into the fund described in the Key Features Document.



UK Investments Child Trust Fund Registered contact application form

Applying is easy. First read the Key Features Document, then complete all white areas (where appropriate) in black ink.
If you want to make regular payments by Direct Debit, complete section 3 **payment method section** and the Direct Debit mandate at the bottom, if selecting this payment method.

***mandatory fields**

1. Your details

*Title		*Address	
*Surname			
*Forename(s)		Town	
Date of birth		County	
Gender	male ☐ female ☐	*Postcode	
Tel. no. day		Country	
Tel. no. eve		Email	

Completing your phone number will minimise delays if we have any queries.

2. I apply to become the registered contact for the UK Investments Child Trust Fund of

*Child's title		*Child's address if different from above	
*Child's surname			
*Child's forename(s)		Town	
*Child's Date of Birth		County	
Child's gender	male ☐ female ☐	*Postcode	
Is the child adopted? Yes ☐ No ☐		Country	
*Unique reference number (URN)		Account number	

3. Payment method

For one off payments The options are:

Cheque ☐ Amount £ Please make payable to: 'OneFamily'
(please write the child's name and date of birth on the back of the cheque and attach to this form)

Direct Credit ☐ If you would like pay by Direct Credit or Standing Order complete all your details and we'll send you a form in the post.

For regular payments The options are:

Direct Debit monthly ☐ Amount (the maximum contribution is £340) £340 ☐ £100 ☐ £50 ☐ £20 ☐ £10 ☐ Other £
Please also select a collection date 1st of the month ☐ 15th of the month ☐

Direct Debit annually ☐ Amount £ (the maximum contribution is £4,080)

Please also select a collection date: 1st of the month ☐ 15th of the month ☐

For Direct Debit payment you will also need to complete the instruction form below.

For Direct Debits we will write to you with confirmation of when your first payment will be taken.

Standing Order ☐ If you would like pay by Direct Credit or Standing Order complete all your details and we'll send you a form in the post.

Please sign and date the declaration overleaf

150711/004

Instruction to your bank or building society to pay by Direct Debit.

Please fill in the whole form using a **ballpoint pen** and send to: FREEPOST ONEFAMILY

Name and full postal address of your bank or building society

To the Manager

Bank/building Society

Address

Postcode

Name(s) of account holder(s)

Bank/building society account number

Branch sort code — —

Banks and building societies may not accept Direct Debit Instructions for some types of account.

Service User No.

Reference number - for office use only

For OneFamily official use only. This is not part of the instruction to your bank or building society

Account holder's address

Postcode

Instruction to your bank or building society

Please pay Engage Mutual Funds Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit guarantee. I understand that this instruction may remain with Engage Mutual Funds Limited and, if so, details will be passed electronically to my bank/building society.

Signature

Date



4. Investment details

Our lifestyling investment approach will automatically apply to your child's account.

However, if you wish, you can choose to opt out by ticking this box ☐

You should read the Key Features Document for an explanation of lifestyling and the alternative.

5. Declaration

I declare that

- I am 16 years of age or over
- I have parental responsibility for the child
- I will be the registered contact for the UK Investments Child Trust Fund.

I authorise OneFamily

- to hold the HM Revenue & Customs contributions, subscriptions, Child Trust Fund 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 Child Trust Fund investments.
- to undertake successive operations on my behalf, and that this will include the collecting of payments and the investing of those payments into the UK Investments Child Trust Fund.

I declare that this application has been completed to the best of my knowledge. I confirm I have read the Key Features Document. I agree to be bound by the Terms and Conditions relating to the UK Investment Child Trust Fund and to inform OneFamily in writing immediately of any change in my circumstances.

We will treat you as a retail customer, which means you will receive the highest level of consumer protection available under UK financial services rules and regulations.

Signature



Date

6. Data protection

Information about you will be held by OneFamily to provide the products and services for which you apply.

We would also like to keep you informed of other products and services. Please tick the appropriate boxes if you **DO NOT** wish to be sent information about our OneFamily products and services by: **mail** ☐

phone ☐

Please tick this box if you **DO NOT** wish to have your details passed to other approved companies ☐

In addition please tick this box if you **DO** wish to be sent information by email and other forms of electronic communication ☐

You can change any of your choices by calling us on **0800 028 1113***.

7. Make additional contributions

The child trust fund account from OneFamily is a great way to get children off to a bright start in life. By saving regularly, you could build a lump sum to help them when they turn 18. One thing to bear in mind is that inflation will reduce the buying power of the lump sum and affect what you can buy in the future.

You, family members and friends can make additional contributions to the CTF account to a combined amount of £4,080 per subscription year – from as little as £5 a month. Any money paid into the account is a gift to the child and cannot be refunded to the payer.

- set up Direct Debit contributions online at onefamily.com/ctf
- or call our dedicated phone line on **0800 028 1113***.

As well as the above option to contribute by Direct Debit, contributions can also be made by Debit Card, cheque, Standing Order and Direct Credit.

Please sign and date the declaration above

A copy of the completed application form is available on request



Call free on **0800 028 1113***



Email us at mail@onefamily.com

*We might record your call to help improve our security and training.
We hope you don't mind. Lines open: Monday – Friday 9am-7pm,
Saturday 9am-1pm.