

Step 7 – Investment Details

Account type (please mark below which type of Child Trust Fund you are applying for)

Baby Bond® Stakeholder Baby Bond® Choice Non-Stakeholder

Is this plan part of a new Children's Portfolio? Yes

Is this plan being added to an existing Children's Portfolio? Yes
(If yes, please complete The Children's Portfolio Add/Remove form)

Only to be completed by IFA

Agency Reference Number:

R 1 6 3 5 2 5

Commission Rebate* (tick one box only)

1% 2% 3%

*This does not apply to the Insight Investment Foundation Growth Fund.

IFA stamp/details – to be completed by the IFA

Allenbridge Group plc
17 Hill Street
London
W1J 5NZ

Did you give advice Yes No

Step 8 – Investment Choice (for Baby Bond® Choice only)

If you have chosen the Baby Bond® Choice Non-Stakeholder account and are only placing the Government voucher at this time, the full value must be invested in just one fund – use the table below to show us which. If you are also making a voluntary contribution (lump sum or monthly), you can spread the whole payment, including the voucher, across a number of funds – use the table to show us how; e.g. Fund A £250, Fund B £250.

Name of fund	£	or %
GARTMORE Cautious Managed Fund	<input type="text"/>	<input type="text"/>
GARTMORE European Growth Fund	<input type="text"/>	<input type="text"/>
GARTMORE US Growth Fund	<input type="text"/>	<input type="text"/>
INSIGHT INVESTMENT Foundation Growth Fund	<input type="text"/>	<input type="text"/>
INSIGHT INVESTMENT Evergreen Fund	<input type="text"/>	<input type="text"/>
INVESCO PERPETUAL Income Fund	<input type="text"/>	<input type="text"/>
INVESCO PERPETUAL UK Smaller Companies Equity Fund	<input type="text"/>	<input type="text"/>
INVESCO PERPETUAL World Growth Portfolio	<input type="text"/>	<input type="text"/>
UBS Medium Term Fixed Interest Fund	<input type="text"/>	<input type="text"/>
UBS UK Select Fund	<input type="text"/>	<input type="text"/>
UBS Global Allocation Fund (UK)	<input type="text"/>	<input type="text"/>
Total amount to be invested	<input type="text"/>	<input type="text"/>

Any more questions? Please see the Key Features, call us on 0845 077 1899 or visit our website at www.thechildrensmutual.co.uk

Please note

• Data Protection Act 1998 (the Act)

We will use the information on this form to process the application, and to administer the CTF account once it has been set up. This information will be available to members of the Tunbridge Wells Equitable Marketing Group and associate companies and agents, but will not be passed to any other party without your consent, unless we are required to do so by law or regulation. The data may also be shared with other financial services companies to help fraud prevention. We may also use it to provide you, or the child, with details of other products or services we can offer or promote. If you do not wish us to do this, please cross the box(es) below as appropriate.

Please do not provide details of other products/services to me to the child .

The Act confers rights of access to information we hold. Details are available on request.

• If you would like to receive further product information offers from us by email please cross this box .

• Money Laundering and Fraud Prevention

International regulations require that we sometimes check certain details about customers. To do this we may use an agency to carry out a search to verify a customer's identity. The details on the application form may be used by the agency to check against other databases (public or otherwise) that are available. The details may also be used in the future to help other organisations to verify the customer's identity and confidential records would be retained. By signing the application form as the registered contact, you give us authority to do this.