

# BMO Child Trust Fund (CTF)

Please use this form if you would like to:

- Change the Registered Contact for a BMO CTF to another person.

To become the Registered Contact, you must have parental responsibility for the child; you may be the child's natural parent, have legally adopted the child, or have been granted legal authority by the courts. The child can also become the RC at age 16 and take over the running of their CTF.

Please email our Investor Services Team at [investor.enquiries@bmogam.com](mailto:investor.enquiries@bmogam.com) or call 0345 600 3030 if you have any queries.

**Please ensure you supply all information requested below. Without the full information your account may be restricted - all fields marked with an \* are required.**

All personal information submitted with this application form will be treated in accordance with BMO Asset Management Limited's Privacy Notice which is available at: [bmoinvestments.co.uk/privacy-policy](http://bmoinvestments.co.uk/privacy-policy).

**Please complete this form in block capitals and black ink.**

**Please return the form to:**

**BMO Asset Management Limited  
PO Box 11114  
Chelmsford  
CM99 2DG**

19DLU/1  
06/19

## Part 1 Child's details

Master	Miss	Child's first name(s) in full	Child's surname
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Child's home address (including postcode)			Account number <input type="text"/>
<input type="text"/>			Country <input type="text"/>
Postcode			
Date of birth	<input type="text"/>	Nationality	<input type="text"/>
National Insurance Number if the child is over 16 years of age		<input type="text"/>	

## Part 2 Personal details (current Registered Contact)

Title (Mr/Mrs/Miss/Ms/Other)*	First name(s) in full*	Surname*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Permanent residential address (including postcode)*		
<input type="text"/>		
Postcode		
Country		
<input type="text"/>		
Telephone	Email address	Nationality*
<input type="text"/>	<input type="text"/>	<input type="text"/>
National Insurance number*	<input type="text"/>	Date of birth* <input type="text"/>

I wish to relinquish my position as Registered Contact for the above child and pass the responsibility to the new Registered Contact as detailed below.

Signature

Date

## Part 3 Personal details (new Registered Contact)

Please ensure you supply all information requested below. Without the full information your account may be restricted - all fields marked with an \* are required.

Title (Mr/Mrs/Miss/Ms/Other)*	First name(s) in full*	Surname*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Permanent residential address (including postcode)*		
<input type="text"/>		
		Postcode
Country	Date of birth*	Nationality*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Relationship to child	<input type="text"/>	National Insurance number*
<input type="text"/>		<input type="text"/>
Telephone	Email address	
<input type="text"/>	<input type="text"/>	

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

### Data Protection

All personal information submitted with this application form will be treated in accordance with BMO Asset Management Limited's Privacy Notice which is available at: [bmoinvestments.co.uk/privacy-policy](https://bmoinvestments.co.uk/privacy-policy). In the Privacy Summary Statement included with this application form, we have provided you with some key information about how we process your personal information. There is a lot more information contained in our Privacy Notice, which we recommend that you read. Should you have any questions regarding how we process your personal information, we have provided you with key contact information in the Privacy Summary Statement, as well as in our Privacy Notice.

### Marketing

We would like to provide you with details of financial services and products that we offer which we think you might find interesting. **If you would NOT like to receive such information, please tick this box** . If at any time you change your mind, please let us know by emailing us at [preferences@bmogam.com](mailto:preferences@bmogam.com). For full details of how we use your personal information, please visit [bmoinvestments.co.uk/privacy-policy](https://bmoinvestments.co.uk/privacy-policy).

## Part 4 Declaration and signature

I declare that:

- I understand and accept that this change in Registered Contact is made on the basis of and subject to the current BMO Child Trust Fund Terms & Conditions.
- I am 16 years of age or over.
- I have full parental responsibility for the child indicated in Part 1.
- I agree to be the Registered Contact for the BMO Child Trust Fund.
- I confirm I have read the Key Features of the BMO Child Trust Fund and in the case of an application for a Stakeholder CTF account I have seen the current Key Investor Information Document (KIID) for the Shares of the BMO FTSE All-Share Tracker Fund (Share Class 1 Accumulation).
- I authorise BMO Asset Management Limited 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 confirm that I have read and understood the Pre-Sales Cost disclosure(s) for the selected savings plan and investment(s).
- All existing Direct Debit arrangements will remain unless you are notified otherwise.
- The information given in this application is correct.

To be signed by person named in Part 3

Date

If you are interested in the Fund(s) and contact us about them, or already hold shares or units in a Fund, we are likely to process personal information about you. As such, and in accordance with our obligations under data protection law, BMO Asset Management Limited's privacy notice provides details about our processing of your personal information. The most up to date version of the Privacy Notice is available online at [bmoinvestments.co.uk/privacy-policy](https://bmoinvestments.co.uk/privacy-policy).

Our Privacy Notice provides you with important information about how, when, and why we collect and process your personal information. The Privacy Notice also provides you with information regarding your rights in relation to the personal information which we process about you and our responsibilities in that regard.

As ISA manager, when we process your personal information, it is being processed:

1. to comply with our legal obligations, such as our financial regulatory obligations (which include the obligation to record calls and monitor trades), identity verification and anti-money-laundering obligations amongst others specified in our Privacy Notice;
2. where it is necessary for us to provide our services to you, which includes, for example undertaking transactions in relation to your investments, communicating with you about your investments and any changes to them or their performance amongst others specified in our Privacy Notice;
3. where it is necessary for our legitimate interests (so long as those legitimate interests are not overridden by your interests or fundamental rights). Those legitimate interests include monitoring calls for training, quality and security purposes, testing our products and services to ensure that they are performing to their best potential (and therefore your financial benefit), contacting you about updates to our Privacy Policy and other document amendments, appointing third party contractors to assist us carry our services amongst others specified in our Privacy Notice;
4. where it is necessary for the performance of a task which is in the public interest, such as assisting with regulatory and/or other law enforcement investigations, as well as for our ability to have appropriate conversations and dialogue with regulators in relation to our business practices; and/or
5. where you have given your consent, such as when you have agreed to receive marketing communications from us, or where you have consented or instructed us to provide information to a third party (such as your financial advisor), or where you have volunteered personal information to us during correspondence amongst others specified in our Privacy Notice.

We can confirm that when you provide personal information to us, it will be shared with other third parties and further information is provided about this in the Privacy Notice. We can also advise you that your personal information will be sent outside of the European Economic Area and our Privacy Notice gives you guidance on how to obtain further information about these transfers, if you would like to know more about them.

As you may be aware, when we process personal information about you, you have certain rights in relation to your personal information and we are under various obligations in relation to the same. Included within the Privacy Notice is information about your rights, and how you can contact us about exercising them.

The above is a summary of the key aspects of how we process your personal information, and important aspects of our Privacy Notice which we consider that you may be most interested in. There is a lot more information and detail on each of the above topics, and other information about how we process your personal information which is contained within our Privacy Notice. We recommend that you take time to read our Privacy Notice, or use it as your first port of call in the event you have a question about our processing of your personal information. Of course, if you have any questions, you can also contact us directly using the below information.

### [bmoinvestments.co.uk/privacy-policy](https://bmoinvestments.co.uk/privacy-policy)

Please contact us if you have any questions about our privacy notice or information we hold about you.

**Our Data Protection Officer** is: Barry Gibbon and he can be contacted by the following means:

**Email:** [Privacy.UK-EU@bmo.com](mailto:Privacy.UK-EU@bmo.com)  
**Write:** BMO Financial Group  
Office of the Data Protection Officer  
95 Queen Victoria Street  
London, EC4V 4HG  
United Kingdom



**BMO Asset Management Limited**

0345 600 3030, 9am - 5pm, weekdays, calls may be recorded or monitored for training and quality purposes.

BMO Asset Management Limited is authorised and regulated by the Financial Conduct Authority and is a member of BMO Asset Management EMEA of which the ultimate parent company is the Bank of Montreal. L20\_06/19\_CM19242