Request for investment decision

CFO 212
(12.11)

Full case name, as it appears on the court order

Name of court

Date of court order

Claim no.

Fund no.

CFO A/C no.

Current funds in court £

Investment requirement - **Total to be invested** £

Litigation friend's details

Name

Address

Postcode

Solicitor's details

Name and Reference

Address

Postcode

Beneficiary's details

Name

Address (if different to litigation friend's address)

Postcode

1. Beneficiary's date of birth

2. Birth certificate seen

☐ Yes ☐ No

3. Majority direction

☐ Yes ☐ No

4. Policy (tick only one box)

☐ Capital growth only

☐ Capital growth and income

☐ Maximum income

☐ Place all funds on special

5. Income directions

☐ Re-invest in special account

☐ Pay litigation friend

☐ Special instruction (Please specify in box 9(a))

6. Income required (If appropriate)
(Complete and attach form CFO 200)

per annum

7. Other income (if any) of beneficiary is

per annum

8. Is the beneficiary liable for income tax?

☐ Yes ☐ No

9. a) Are there any restrictions for the investment policy?

☐ Yes ☐ No

If Yes, please give details

b) Is the litigation friend aware that if there are more than five years to majority and £10,000 or more to invest, part of the fund may be invested in the Equity Index Tracker Fund?

☐ Yes ☐ No

☐ N/A (if less than five years or amount less than £10,000)

10. Is there a legal aid charge?

☐ Yes ☐ No

If Yes, give ref.

11. Interest prior to order date

☐ To be paid out to defendant's solicitors
(Complete and attach form CFO 200)

☐ To go to fund

Signed

Master/District Judge/Proper Officer

Date

Authentication stamp

How to contact the Court Funds Office

Address

Court Funds Office, Glasgow, G58 1AB

Court Funds Office, DX 501757, Cowglen

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