

# Management of a protected beneficiary's fund

(where the award is £10,000 or more but less than £50,000, or where the Court of Protection has directed retention of the fund) (Pre-Investment hearing)

**CFO 320PB**  
(01.19)

The litigation friend should complete only Parts A to E, where applicable, before the hearing and bring the form to the hearing.

## Part A

### Full case title

Claimant

Defendant

Name of the court where the hearing is to be held

Claim number

What is the date of the investment hearing?

Have you read the fact sheet that accompanies this form?

☐ Yes ☐ No

Does a legal aid charge apply?

☐ Yes ☐ No

If Yes, please enter your legal aid reference below

### Litigation friend solicitors' details

Name

Address

Postcode

Solicitors reference

## Part B

You should ensure that the information requested in Part B is completed accurately. The Court Funds Office will use the details provided to set up the protected beneficiary's account.

Full name of protected beneficiary

Protected beneficiary's date of birth

Full name of litigation friend

Address

Postcode

Contact telephone number

E-mail address

Address of protected beneficiary if different to that of litigation friend

Postcode

## How to contact the Court Funds Office

### Customer Helpline

0300 0200 199

### Email

enquiries@cfo.gsi.gov.uk

### Address

Court Funds Office  
Sunderland  
SR43 3AB

Court Funds Office  
DX 328004  
Sunderland 19

For full details of how your information is used please see our privacy notice at <https://www.gov.uk/government/collections/court-funds-office-forms> or contact CFO who will provide you with a copy.



# To be completed by the judge

## Section 1 — May be completed by court staff

### Full case title

Claimant

Defendant

Claim number

In attendance at the hearing

Current funds in court

£

:

Total to be invested

£

:

## Section 2 — Only to be completed by the judge

Full name of protected beneficiary

Protected beneficiary's date of birth

## Section 3 — Only to be completed by the judge

### One off/regular payments – please refer to Part C

☐ One off payment of

£

:

☐ Regular payment of

£

:

To be paid

☐ Monthly

☐ Every 6 months

☐ Quarterly

☐ Annually

Please state the **day of the month** that money should reach the account.

day of the month

Has a copy bank statement/letter been provided?

☐ Yes

☐ No

## Section 4 — Only to be completed by the judge

### Investment instructions – please refer to Part D

Money may only be invested in the EITF where the protected beneficiary has between £10,000 and £49,999.99 held in court or where the sum is greater but the Court of Protection has directed that the fund be retained and invested in the same way as the fund of a child and the money is likely to be invested for five years or more.

Investment policy

☐ Capital growth

ONE

☐ Capital growth and income

TWO

☐ Maximum income

THREE

☐ Place all funds on special

FOUR

Interest directions

☐ Re-invest in special account

☐ Pay litigation friend

☐ Re-invest in the Equity Index Tracker Fund

Dividend directions (if investment in the Equity Index Tracker Fund)

☐ Re-invest in special account

☐ Pay litigation friend

☐ Re-invest in the Equity Index Tracker Fund

### Only to be used if the policy differs from the framework above.

Signature

Name of judge

Date