

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 £99,999.99 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