Request for Investment Decision

Pursuant to Order dated

In the ______ Division of the High Court

______ District Registry/County Court

Claim No. ______ Fund No. ______ CFO A/c No. ______

Majority Date (CFO use)

Full Account Title ______

1. Current Funds In Court

2. Investment Requirement: Total to be invested is (For interest, see part 14)

Name	**Address (in BLOCK CAPITALS)**
3. Litigation Friend	
4. Solicitor's name and reference	
5. Beneficiary's name in full	(If different from Litigation Friend's address, give full address)

6. Date of Birth

Birth Certificate seen (please circle appropriate box) Y N

7. Majority Direction Y N

(please circle appropriate box)

8. Policy (tick one box only)

- Capital Growth Only ☐
- Capital Growth and Income ☐
- Maximum Income ☐
- Place all funds on Special ☐

9. Income Directions

- Re-invest in special account ☐
- Pay Litigation Friend ☐
- Special instruction (Please specify in box 14(a)) ☐

10. Income required (if appropriate)

£ ______ per annum

11. Other income (if any) of beneficiary is

£ ______ per annum

12. Is the beneficiary liable for Income Tax? Y N

13. Specific known liabilities of beneficiary

(a)

(b)

14. (a) Are there any restrictions for the investment policy? If yes, please state.

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 Unit Trusts or similar investment vehicles?

Y Please go to section 13 N/A If less than five years or amount less than £10,000

15. Is there a Legal Aid Charge? Y N

if Yes, give ref.

16. Interest prior to order date

(a) To be paid out to defendant's Solicitors (complete Form 200) ☐

(b) To go to fund ☐

Signed ______ Date ______

(Master/District Judge/Checking Officer)

Authentication Stamp

Advice from Private Advisors (please attach)

For CFO use only

Court Funds Office Form 212 (Court Funds Rule 34(2)) (02.09)

Click here to reset form | Click here to print form

Investment Schedule

The Accountant General is directed to invest the following sum(s):

CFO use only

Schedule No		Date Schedule Received	
A/c No			
A/c No Carry over			Init.
Completed	Init.	Ack sent	Init.
CFO 205		Amendments/ Fiche ref	
Securities Branch to note			
Withdraw Basic	£		Init.
Raise/Withdraw/ Place/Special *	£		Init.

Pay or invest in:

Nominal/Cash *	Description of Security	Security Amount & Number	Transaction Details
			Bought for £ p on Init.
			Bought for £ p on Init.
			Bought for £ p on Init.

*** Delete as appropriate**

Authentication Stamp

Signed ____________________ Date ____________________

Investment Manager/Officer

Court Funds Office Form 212 (Court Funds Rule 34(2))