

Internal Asset Transfer - GIA individual/joint

This application can be used to internally transfer investments between existing joint or individual GIA wrappers only. Please ensure that all names of joint holdings are detailed.

We will accept this form without a signature, provided there is no change to the beneficial owner and it's submitted through Adviser Zone. If there's a change in beneficial owner, all parties must sign this document to confirm acceptance.

If you choose to sign the completed form please arrange for the original to be returned to us.

If you need assistance completing this form please contact the client services team on 0345 680 8000.

Investor Details

Internal Asset Transfer from

Investor number: Wrapper number:

Investor name(s)

Forename(s): Forename(s):

Last name: Last name:

Please include here any notes regarding this internal asset transfer (please do not use a cover letter for key information).

Internal Asset Transfer to

Investor number: Wrapper number:

Investor name(s)

Forename(s): Forename(s):

Last name: Last name:

Please include here any notes regarding this internal asset transfer (please do not use a cover letter for key information).

Client Declaration

Name:

Client Signature:

Date (dd/mm/yyyy):

Name:

Client Signature:

Date (dd/mm/yyyy):

Name:

Client Signature:

Date (dd/mm/yyyy):

If you require this document in an alternative format please contact us.

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