

General Investment Account Transfer Authority Form

Complete this form to transfer an existing General Investment Account (GIA) into a Wealthtime Classic GIA.
If you are sending this form by post, please complete in CAPITAL LETTERS using black ink and return to:
Wealthtime Classic, PO Box 2468, SALISBURY, SP2 2UH.

Personal details

Applicant one

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

If 'other' please state

First name(s) in full

Last name

Date of birth
(dd/mm/yyyy)

National
Insurance
number

Permanent
residential address

Applicant two (optional)

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

If 'other' please state

First name(s) in full

Last name

Date of birth
(dd/mm/yyyy)

National
Insurance
number

Postcode

Account to be transferred

Name of GIA

General Investment
Account number(s)

Name of
transferring General
Investment Account
provider

Address of
transferring General
Investment Account
provider

Postcode

Transfer details

Please transfer the cash balance to Wealthtime Classic by bank transfer.

☐

If it's not possible to re-register my existing GIA investments, please arrange for these to be sold and transferred in cash:

Yes

☐

No

☐

Or please indicate as appropriate. I'd like you to:

Sell the assets held in my existing GIA and transfer the cash proceeds to my Wealthtime Classic GIA or

☐

If you wish to transfer a portion of your GIA, and not the whole amount, please indicate the value to be transferred as a percentage or amount (£):

Arrange for the re-registration of assets held in my existing GIA to my Wealthtime Classic GIA.*

☐

*Any re-registration of investments into your Wealthtime Classic GIA will be subject to your existing GIA manager allowing this type of transfer and your investments being available on the Wealthtime Classic Funds List.

Transfer authorisation

Please transfer the above GIA to my/our Wealthtime Classic GIA. I/We also request and consent to the transfer set out in this application form. By signing this declaration, I/We authorise you to release details about the transfer from my/our current GIA to Wealthtime Classic.

Your signature
(applicant one)

Your signature
(applicant two)

Full name

Full name

Date (dd/mm/yyyy)

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Date (dd/mm/yyyy)

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

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