General Investment Account Transfer Authority Form

Section 1 – Our account details

|  |  |
| --- | --- |
| Account ID  |   |
| Name of account  |   |
| Type of account being transferred i.e. company/charity or pension trustee  |   |
| Address |   |

Section 2 – Account to be transferred

|  |  |
| --- | --- |
| Name of account provider  |   |
| Name of account  |   |
| Account ID  |  |
| Estimated transfer value  |   |
| Address of account provider  |   |

Section 3 - Transfer type

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Transfer type  | Full  |  | Partial  |  |

|  |  |
| --- | --- |
| If a partial transfer is required, please confirm the value to be transferred as a percentage or amount.   |  |

Section 4 - Transfer method

|  |  |  |  |
| --- | --- | --- | --- |
| Sell the assets held and transfer the cash proceeds  |   | Please arrange for the re-registration of assets held\*  |   |

\* Any re-registration of assets will be subject to your existing manager allowing this type of transfer and your investments being available on our platform**.**

Section 5 – Declaration

I declare that:

* I/we authorise and instruct the above account administrator to transfer the sums listed on the application to {ISP} and Söderberg & Partners Wealth Management (Seccl Custody Limited).
* I/we authorise {ISP}, Söderberg & Partners Wealth Management (Seccl Custody Limited) and the current provider named in this application to obtain and release information from each other to allow the transfer to proceed.
* I understand that until this application has been completed and is accepted, the responsibilities of {ISP} and Söderberg & Partners Wealth Management (Seccl Custody Limited) are limited to returning any funds received direct to the ceding provider.

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Name of corporate entity |  |
| First signatory |  |
| First signatory name |  |
| Signatory position |  |

|  |  |
| --- | --- |
| Name of corporate entity |  |
| Second signatory |  |
| Second signatory name |  |
| Signatory position |  |