Joint GIA Transfer Form

This form lets you transfer an existing Joint General Investment Account (GIA) into a Joint GIA with Söderberg & Partners Wealth Management.

Seccl Custody Limited is the custodian in respect of the Söderberg & Partners Wealth Management GIA.

If you do not already have a Söderberg & Partners Wealth Management GIA, you will need to apply for one before submitting this form.

Section 1 – Your account details

|  |  |  |  |
| --- | --- | --- | --- |
| Client one |  | Client two |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Client first name(s) |  |  | Client first name(s) |  |
|  |  |  |  |  |
| Surname |  |  | Surname |  |
|  |  |  |  |  |
| Date of birth |  |  | Date of birth |  |
|  |  |  |  |  |
| National insurance number |  |  | National insurance number |  |

|  |  |
| --- | --- |
| Address |  |
|  |  |  |  |
|  |  | Postcode |  |

Section 2 – Account to be transferred

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

**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

* We authorise and instruct the above account administrator to transfer the sums listed on the application to Söderberg & Partners Wealth Management and Seccl Custody Limited.
* We authorise 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.
* We understand that until this application has been completed and is accepted, the responsibilities of Söderberg & Partners Wealth Management and Seccl Custody Limited are limited to returning any funds received direct to the ceding provider.

|  |  |  |
| --- | --- | --- |
| Client one | Signature | Date |
|  |  |  |
|  |  |  |
| Client two | Signature | Date |
|  |  |  |