

transferring investments to your account

To transfer investments held with another broker, simply complete this form and return it to us. We will then liaise directly with your existing broker. Please complete a separate form for each broker. If you are not already an account holder, please ensure you complete a Share Account application, available at www.share.com/forms or by calling us on 01296 41 41 41.

Section 1: Your details

Title Surname Customer reference
Forename(s) Account
Phone Email

Section 2: Existing broker details

We will contact your existing broker using the details you provide below. Please bear in mind that your existing broker may have exit charges.

Existing broker details

Company name
Address
 Postcode
Account reference

Section 3: Instruction to existing broker

(tick one option)

- Please transfer ALL my investments and cash to The Share Centre (default).
- Please transfer the investments as detailed overleaf to The Share Centre.

Section 4: Transferring investments to a joint account (if applicable) - where the current investment(s) is in a sole name

If you are transferring to a joint account, you are required to gift investments to joint ownership. Please complete the declaration below.

Declaration for joint ownership

I, the current shareholder hereby instruct The Share Centre to transfer the investment(s) by way of gift to the joint ownership of:

I understand that a transfer of shares between spouses is free of Capital Gains Tax but that transfers between other parties may be subject to tax and/or stamp duty. I understand that it is my responsibility to notify HMRC. If I have any doubts I will seek the appropriate independent advice.

Signature Date

Section 5: Authorisation

Please transfer my/our investment(s) as detailed above to The Share Centre with immediate effect and also:

- Provide The Share Centre with relevant information regarding the investment(s) I wish to transfer
- Act upon instruction from The Share Centre
- Deduct any fees for the transfer as set out in your Terms of Business

Signature(s) Date

