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**GIA Transfer Form**

This form lets you transfer an existing General Investment Account (GIA) into a GIA with YOUR Platform.

Seccl Custody Limited (SCL) is the custodian in respect of YOUR GIA.

If you do not already have a YOUR GIA you will need to apply for one before submitting this form.

**Your details**

|  |  |
| --- | --- |
| Title (if any) | <<Insert Details>>  |
| Full name | <<Insert Details>>  |
| National insurance number  | <<Insert Details>>  |
| Date of birth | <<Insert Details>>  |
| Permanent residential address | <<Insert Details>>  |
| YOUR Platform GIA account number | <<Insert Details>>  |

**GIA Transfer Authority**

|  |  |
| --- | --- |
| Current GIA provider | <<Insert Details>>  |
| Current GIA reference / account number | <<Insert Details>>  |
| Partial or full transfer? | <<Insert Details>>  |
| Amount to transfer (if partial) | <<Insert Details>>  |
| In-specie or cash? | <<Insert Details>>  |

**Declaration**

I declare that:

* I have read and understood YOUR Platform terms and conditions;
* I give authority to YOUR Platform and the custodian (SCL) to transfer my GIA;
* Information provided in this application is correct to the best of my knowledge. I will notify YOUR Platform of any changes to the information provided;
* I accept that YOUR Platform will not be liable to any losses incurred as a result of any delays in the transfer to my YOUR GIA;
* I am the beneficial owner of any assets being transferred and will remain so once the asset has moved into YOUR GIA;
* I accept that YOUR Platform will not be liable to any costs or fees levied by the existing GIA custodian;

**Transfer Instruction**

* I hereby authorise my existing GIA provider to:
* Transfer my existing GIA as specified to YOUR Platform;
* Provide any information necessary to YOUR Platform and SCL to facilitate the transfer;
* Cancel any direct debits currently in place with immediate effect;
* Deduct any charges for the transfer as specified within your terms and conditions.

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Name | <<Insert Details>>  |
| Date | <<Insert Details>>  |
| Signature | <<Insert Details>>  |

|  |  |
| --- | --- |
| Adviser Name |  <<Insert Details>>  |

**Transfer Acceptance**

*For the attention of the ceding provider.*

Please make the payment to the following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 308012

Payment Reference: INVST – <<INSERT ACCOUNT ID>>

**Please note: we do not accept cheques or postal forms.**

Please send all correspondence relating the transfer to Questions@YOUR-Platform.co.uk and transfers@seccl.tech.

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