

**Joint GIA Transfer Form**

This form lets you transfer an existing General Investment Account (GIA) in joint names into two sole name GIAs with YOUR Platform.

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

If you do not already have YOUR GIAs, you will need to apply for them before submitting this form.

**Client 1 details (lead client\*)**

|  |  |
| --- | --- |
| 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>> |

\*We will use the lead client account to assign any amounts needing to be allocated due to rounding of values and units from splitting the joint GIA.

**Client 2 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 Account Number | <<Insert Details>> |
| Full or Partial Transfer? | <<Insert Details>> |
| Amount To Transfer (if partial) | <<Insert Details>> |
| In-specie or Cash? | <<Insert Details>> |

**Declaration**

We declare that:

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

**Transfer Instruction**

* We hereby authorise my existing GIA provider to:
* Transfer our 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>> |

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

|  |  |
| --- | --- |
| 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: 30-80-12

Payment Reference: INVST – <<YOUR Platform GIA Account Number >>

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

Please send all correspondence relating to the transfer to [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk) and [transfers@seccl.tech](mailto:transfers@seccl.tech).

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