Logo, company name

Description automatically generated**Joint GIA Transfer Form**

This form lets you transfer an existing General Investment Account (GIA) in joint names into two sole name GIA’s with YOUR Platform. Seccl Custody Limited (SCL) is the custodian in respect of YOUR GIA.

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

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

|  |  |
| --- | --- |
| Title (if any) |  |
| Full Name |  |
| National Insurance Number |  |
| Date of Birth |  |
| Permanent Residential Address |  |
| YOUR Platform GIA Account Number |  |

\*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) |  |
| Full Name |  |
| National Insurance Number |  |
| Date of Birth |  |
| Permanent Residential Address |  |
| YOUR Platform GIA Account Number |  |

Logo, company name

Description automatically generated**GIA Transfer Authority**

|  |  |
| --- | --- |
| Current GIA Provider |  |
| Current GIA Account Number |  |
| Full or Partial Transfer? |  |
| Amount to Transfer (if Partial) |  |
| In-Specie or Cash? |  |

**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 our 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 are the beneficial owners 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 our 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

We have read and agreed to the declaration above. Logo, company name

Description automatically generated

|  |  |
| --- | --- |
| Name |  |
| Date |  |
| Signature |  |

|  |  |
| --- | --- |
| Name |  |
| Date |  |
| Signature |  |

|  |  |
| --- | --- |
| Adviser Name |  |

**Transfer Acceptance**

*For the attention of the ceding provider*

Please make the payment to 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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