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 a Joint GIA with YOUR Platform. Seccl Custody Limited (SCL) is the custodian in respect of YOUR GIA.

If you do not already have a YOUR Joint GIA open, you will need to apply for one 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 |  |

\*The Lead Client must match exactly what the current provider states.

**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 |  |
| Name on Account |  |
| Current GIA Account Number |  |
| Address for GIA Provider |  |
| Estimated Transfer Value |  |
| 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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