**Trust / Corporate GIA Transfer Form**

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

**Account Details**

|  |  |
| --- | --- |
| Type of Account being transferred | Company/Charity/Trustee |
| Name of Account |  |
| Account Number |  |
| Address |  |
| YOUR Platform GIA Account Number |  |

**Trust / Corporate GIA Transfer Authority**

|  |  |
| --- | --- |
| Current GIA Provider |  |
| Name of Account |  |
| Current GIA reference / account number  |  |
| Provider Address |  |
| Estimated Transfer Value |  |
| Partial or full transfer? |  |
| Amount to Transfer (if partial) |  |
| In-specie or cash? |  |

**Declaration**

I declare that:

* I/We authorise and instruct the above account administrator to transfer the sums listed on the application to YOUR Platform and Seccl Custody Limited.
* I/we authorise YOUR Platform, Seccl Custody Limited and the current provider named in this application to obtain and release information from each other to allow the transfer to proceed.
* I/We understand that until this application has been completed and is accepted, the responsibilities of {ISP} and Seccl Custody Limited are limited to returning any funds received direct to the ceding provider.

I/We have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Name of Corporate Entity |  |
| Name of Signatory (1) |  |
| Signature |  |
| Signatory Position |  |
| Date |  |

|  |  |
| --- | --- |
| Name of Corporate Entity |  |
| Name of Signatory (2) |  |
| Signature |  |
| Signatory Position |  |
| Date |  |

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