Logo, company name

Description automatically generated**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**Logo, company name

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|  |  |
| --- | --- |
| 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**Logo, company name

Description automatically generated

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 |  |

Seccl Custody Limited is the custodian of assets held on the platform and is authorised and regulated by the Financial Conduct Authority, Registration No. 793200 and registered in England and Wales No. 10430958. Registered office 20 Manvers Street, Bath BA1 1JW.