

Broker Transfer Form – Full Transfer



This form is designed to allow you to simply instruct the transfer of all existing holdings at another broker to your account and/or Stocks & Shares ISA and/or SIPP dealing account with Beaufort. Please complete the information required in Sections 1 & 2 and sign & date in Section 3. Then return this transfer form to us at **Beaufort, 63 St Mary Axe, London EC3A 8AA**.

Once we receive the form we will contact your existing stockbroker to commence the transfer and you will be subject to our Terms of Business.

Section 1: Other Stockbroker Account Details

Account Type:	Stockbroking <input type="checkbox"/>	ISA <input type="checkbox"/>	SIPP <input type="checkbox"/>	(Please tick as appropriate)
Transfer Type:	Stock/In specie* only <input type="checkbox"/>	Cash only <input type="checkbox"/>	Stock & cash <input type="checkbox"/>	(Please tick as appropriate)
Company Name	<input type="text"/>	Account Number	<input type="text"/>	
Address	<input type="text"/>			
Town/City	<input type="text"/>	Postcode	<input type="text"/>	
Contact	<input type="text"/>	Email Address	<input type="text"/>	

Section 2: Account Details of your account with us

Account Number	<input type="text"/>					
Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Dr <input type="checkbox"/>	Other <input type="text"/>
Forenames	<input type="text"/>		Surname	<input type="text"/>		
Address	<input type="text"/>					
Postcode	<input type="text"/>					
Daytime Phone	<input type="text"/>		Mobile Phone	<input type="text"/>		

Section 3: Declaration

I wish to transfer all securities held at the stockbroker detailed in Section 1 to my account and/or Stocks and Shares ISA and/or SIPP dealing account detailed in Section 2 with immediate effect.

By signing below I declare that:

- You may provide any requested information relating to my account to Beaufort;
- You may act upon any and all instructions from Beaufort;
- Any cash balance in my account should be remitted to Beaufort;
- You may deduct any charges for the transfer as specified in your Terms of Business or Rate Card.

Signature:

X

Date:

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*In-specie - transferring stock without having to liquidate and subsequently repurchase