

Broker Transfer Form - Partial Transfer **BEAUFORT**

This form is designed to allow you to instruct a partial transfer of your 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 & 3 and sign & date in Section 4. 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: Transferring 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: 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: Securities to be transferred

On the attached page please list the details of the securities to be transferred to your account from the broker detailed in Section 1.

Special Instructions to your existing broker.

