

Fund and Share Transfer Letter of Authority

Please complete one **Transfer Letter of Authority** for each provider/plan manager you wish to transfer from and return to us with your completed **Fund and Share Transfer Application**. Please print or photocopy additional copies of this form if required. **If possible, a list of the investments you are transferring should also be submitted. For example, a copy of your last valuation statement.**

If you wish to make a partial transfer of your existing account, you should complete a **Partial Transfer Letter of Authority**.

Need help in completing this form? Call us on **020 7189 2400**.

Please complete all sections of this form in **BLOCK CAPITALS**

1. Your details

First named holder

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First names (in full)

Postcode

Second named holder

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First names (in full)

Postcode

Third named holder

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First names (in full)

Postcode

2. Details of investments being transferred

Current provider's/plan manager's name

Current provider's/plan manager's address manager's name

Postcode

Existing account no./Reference

Approximate Transfer Value

£

3. Valuation of Investment

Please provide a copy of your current valuation, including book costs, SEDOL or ISIN details to speed up the transfer

4. I would like to transfer this/these holding(s) to Evelyn Partners Investment Management Services Limited as:

Stock/Funds

(as opposed to in cash)

All holdings in your existing account will be transferred along with any cash

or

Cash

All holdings will be sold and the cash proceeds transferred along with any other cash

5. Declaration & signature

By signing below, I authorise the Provider named above to:

- Provide Evelyn Partners Investment Management Services Limited and their appointed custodian, SEI Investments (Europe) Ltd, with any information they may require in respect of the investments being transferred
- Either transfer my holdings to Bestinvest's appointed custodian, SEI Investments (Europe) Ltd, or liquidate the assets with immediate effect, and forward the proceeds to Bestinvest's appointed custodian as instructed above
- Stop collecting my regular savings with immediate effect (if applicable)

I confirm that the transfer of any holdings will not change the beneficial ownership from the current holder.

| | |
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| Name (First Named Holder) | |
| <input type="text" value="X"/> PLEASE SIGN HERE <input type="text" value="X"/> | Date <input type="text" value="D D M M Y Y Y Y"/> |
| Name (Second Named Holder) | |
| <input type="text" value="X"/> PLEASE SIGN HERE <input type="text" value="X"/> | Date <input type="text" value="D D M M Y Y Y Y"/> |
| Name (Third Named Holder) | |
| <input type="text" value="X"/> PLEASE SIGN HERE <input type="text" value="X"/> | Date <input type="text" value="D D M M Y Y Y Y"/> |

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Once completed, please submit by either:

- **Signing this form digitally** using Adobe sign.
- **Printing out and posting** to Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY.
- **Scanning the form and emailing** to best@bestinvest.co.uk