STOCKTRADE
INTER ACCOUNT TRANSFER

Please complete in block capitals and black ink and return to **Stocktrade, 11/12 Wellington Place, Leeds, LS1 4AP**.

You can use this form to transfer cash or investments from a Stocktrade ISA or General Investment Account into another Account. It should not be used to transfer money from a Cash ISA or to transfer shares into an ISA.

If the transfer is to a new Account you must complete the relevant Account Application Form. If the transfer is to an existing ISA where no subscriptions have been made in the previous tax year, you must complete an Existing ISA subscription Form. These documents can be obtained by emailing **support@stocktrade.co.uk** or calling our Customer Services Team on **0131 240 0400**.

1 ACCOUNT AND PERSONAL DETAILS

Enter the details of the Account you are withdrawing from.

Title: Transferring Account Number:

Surname:

First name(s):

Stocktrade Account Number:

If there are two or more joint holders of the above Account, the first-named joint holder should insert details in the section above, and sign in Section 4. All other joint holders must also sign and date in Section 5.

2 DIRECTION TO STOCKTRADE

I/We direct you to transfer the cash and investments detailed in Section 3 from the account above into the following account:

Title: Receiving Account Number:

Surname:

First name(s):

Stocktrade Account Number:

If there are two or more joint holders of the above Account, please insert the details of the first-named joint holder in the section above.

3 ASSETS TO BE TRANSFERRED

If you are transferring to an ISA you can only transfer cash. Any transfers to an ISA will be placed in the Deposit Account and will be treated as a subscription. If you wait until you have your username and Password and make your investment instructions online, our online dealing fees will apply. If you complete the section below our offline dealing charges will apply.

Transfer the Account in full ☐ Yes ☐ No

OR Transfer the following investments and/or cash only (please list in table below) ☐

Investment[1]		State number of shares or 'ALL'	Transfers of cash from Security Account[2]		
Name (including class)	MEX/TIDM Code		Tick if none	Tick if all	If not all, insert the amount to be transferred
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	
Transfers of cash from Deposit Account[3]	DEPO			☐	
Transfers of cash from Online Dealing Account[4]				☐	

Notes

1. Enter the full name and class of each investment you wish to transfer. This is important as there may be different classes available. Please also quote the TIDM/MEX code which you can get by contacting our Customer Services Team.
2. Please complete this section if you wish to transfer cash from the Security Account of your existing Account into the Account specified in Section 2.
3. If you wish to transfer cash from the Deposit Account of your existing Account into the Account specified in Section 2 please enter the amount to be transferred.
4. If you wish to transfer cash from your Online Dealing Account into the Account specified in Section 2 please enter the amount to be transferred. If you are acting as an executor on a bereaved account, then this option is not available.

4 SIGNATURE

I/we instruct Stocktrade to withdraw from my/our Account the cash and/or asset(s) specified in Section 3 and transfer it/them to the Account specified in Section 2.

I declare that either:

- I have told the Account holder specified in Section 2 that this transfer is being made
- I am the Account holder specified in Section 2.

Signature:

Print Name: Date: D D M M Y Y Y Y

If there are two or more joint holders of the Account from which the transfer is being made, the first-named joint holder should sign and date the above, and all other joint holders must sign and date in Section 5. We can only process the transfer with the signatures of every joint holder.

5 JOINT HOLDERS DETAILS AND SIGNATURE

Joint holder 1

Joint holder signature:

Print Name: Date: D D M M Y Y Y Y

Joint holder 2

Joint holder signature:

Print Name: Date: D D M M Y Y Y Y

Joint holder 3

Joint holder signature:

Print Name: Date: D D M M Y Y Y Y

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