

# Fund and Share Transfer Letter of Authority

Please complete one **Partial 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. If you are transferring certificated shares, you should complete and return a **Stock Lodgement Form**.

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. I would like to transfer this/these holding(s)

**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

## 4. 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.

Name (First Named Holder)	
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
Name (Second Named Holder)	
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
Name (Third Named Holder)	
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Once completed, please return this form to: **Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY**

BI-Fund-and-Share-Transfer-Letter-Of-Authority-Jan-22