

Fund and Share Transfer Letter of Authority - Pension Scheme

Please complete one **Transfer Letter of Authority** for each transfer you wish to make, printing or photocopying additional copies if required. If you are transferring certificated stocks, please complete and return a **Stock Lodgement Form** rather than a **Letter of Authority**.

If you require any help in completing this form, please call us on 020 7189 9999.

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

1. Your details

Name of Pension Scheme

Primary Administrator/Trustee

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

Surname

First Names (in full)

Postcode

Primary Member (SIPP only)

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

Surname

First Names (in full)

Postcode

Co-Trustee (if applicable)

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

Surname

First Names (in full)

Postcode

Fourth Trustee

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

Postcode

Existing Account No./Reference

Existing Account Designation (if applicable)

Approximate Transfer Value

£

3. Please take this authority to transfer holdings

(Please tick one choice only)

I/we 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 the existing account will be transferred along with any cash.
(Please include a list of all stock/assets being transferred)

or

☐

Cash

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

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4. Declaration & signature

By signing below, I/we 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 the holdings to Bestinvest's appointed custodian, SEI Investments (Europe) Ltd, or liquidate the assets within the investments with immediate effect, and forward the proceeds to Bestinvest's appointed custodian
- Stop collecting any regular savings with immediate effect (if applicable)

Name (on behalf of Scheme Administrator/Trustee Company):

X

PLEASE SIGN HERE

X

Date

D

D

M

M

Y

Y

Y

Y

Name (on behalf of Scheme Administrator/Trustee Company):

X

PLEASE SIGN HERE

X

Date

D

D

M

M

Y

Y

Y

Y

Name (Primary Member):

X

PLEASE SIGN HERE

X

Date

D

D

M

M

Y

Y

Y

Y

Name (Co-Trustee):

X

PLEASE SIGN HERE

X

Date

D

D

M

M

Y

Y

Y

Y

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

G007V1-09.22

Bestinvest is a trading name of Evelyn Partners Investment Management Services Limited, which is authorised and regulated by the Financial Conduct Authority. Registered in England at 45 Gresham Street, London EC2V 7BG. No. 02830297.

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