

Transfer Form

Applicants must fully complete all sections.

If you have any queries about opening an account please call us on 01892 700834

In order to **protect your personal information** when sending back your form we recommend you use a recorded or tracked mail service.

1. Transfer Form

TO BE COMPLETED BY ALL APPLICANTS

in the 'Receiving Account' box on each transfer form. If you do not yet have an account with us to receive your shares, you will need to complete an application form or

apply online.

TO BE COMPLETED BY ALL APPLICANTS			
1 st Applicant	2 nd Applicant – joint accounts only		
Title (eg. Mr/Mrs/Dr etc)	Title (eg. Mr/Mrs/Dr etc)		
Surname	Surname		
Forenames in full	Forenames in full		
Permanent residential address	Permanent residential address		
Postcode	Postcode		
Date of birth	Date of birth		
National Insurance Number/National Identifier	National Insurance Number/National Identifier		
If you have more than one nationality please list on a separate sheet together with the relevant national identifier for that nationality – further details regarding national identifiers can be found on our website or call us.	If you have more than one nationality please list on a separate sheet together with the relevant national identifier for that nationality – further details regarding national identifiers can be found on our website or call us.		
Telephone (Home)	Telephone (Home)		
Telephone (Work)	Telephone (Work)		
Telephone (Mobile)	Telephone (Mobile)		
Email	Email		
Account Number			
Please ensure you state your account number with us			

Now please complete Section 2 to transfer a trading account AND / OR Section 3 to transfer an ISA



Transfer Form

ONLY TO BE COMPLETED BY THOSE WISHING TO TRANSFER A TRADING ACCOUNT				
Existing Broker's Details				
Name of Company				
Correspondence address				
Postcode Telephone	Telephone			
Existing Broker Account Number				
Receiving Trading Account Number				
I hereby authorise you to transfer this account to Jarvis Investment Management Ltd on their written instruction to do so and provide such information regarding my above specified Account which they may require.				
I wish to transfer my account (✓ one box) in cash in shares both pa	artial as listed below			
Name of shares	Number of shares			
1st Applicant				
Signed	Date			
2nd Applicant - joint accounts only				
Signed	Date			



Transfer Form

2. ISA Transfer ONLY TO BE COMPLETED BY THOSE WISHING TO TRANSFER AN ISA			
Existing ISA N	A Manager Details		
Name of Com	mpany		
Corresponden	ence address		
Postcode	Telephone		
Existing ISA Ac	Account number		
Receiving ISA a	A account Number		
I hereby authorise you to transfer this account to Jarvis Investment Management Ltd on their written instruction to do so and provide such information regarding my above specified Account which they may require.			
I wish to trans	nsfer my account (🗸 one box) in cash in shares both partial as li	sted below	
Name of sha	hares Nu	mber of shares	
Signed	Date	2	
On completion please return to: Jarvis Investment Management Ltd, 78 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS. Additional forms are available on request.			