Investment Account Transfer Form

For personal clients

PLEASE PRINT CLEARLY IN BLOCK CAPITALS IN ALL SECTIONS

PLEASE SEND THIS FORM TO 7IM WITH THE LATEST STATEMENT FROM YOUR CURRENT INVESTMENT PROVIDER

7IM

Current Investment Manager name and address:

City:

County (or country if not UK):

Postcode:

Please complete a separate Transfer Form for each Investment Account you want to transfer.

Client one

Title:

First Name(s):

Surname:

Client two (if applicable)

Title:

First Name(s):

Surname:

Client three (if applicable)

Title:

First Name(s):

Surname:

Current Permanent Residential Address:

City:

County (or country if not UK):

Postcode:

I wish to transfer the following investment accounts to Seven Investment Management (7IM).

Account Number(s):

Please note that some providers may charge you an exit fee.

I authorise my existing provider to transfer the account(s) quoted to 7IM. I authorise my existing provider to provide 7IM with any information (written or non written) about the account(s) and to accept any instructions from them relating to the account(s) to be transferred.

Please tick one box only.
I wish to transfer the account(s) shown as follows.
A FULL transfer as below:

☐ A **FULL** transfer – RE-REGISTER all the holdings as they are currently invested and transfer them with any residual cash to 7IM*

OR

☐ A **FULL CASH** transfer - SELL all holdings and send the resulting cash to 7IM

OR

☐ A **PARTIAL** transfer – RE-REGISTER the holdings listed below as they are currently invested and transfer them to 7IM*

OR

☐ A **PARTIAL CASH** transfer – SELL the holdings listed below and send the resulting cash to 7IM*

(Please specify any special requirements below)

Your signature(s) is required for the completion of this form

Your Signature:

Signed by (please PRINT name):

Date:

☐ **I have enclosed a recent valuation / statement of holdings to be transferred.** Providing a valuation / statement will speed up the transfer process.

Second Signature (if applicable):

Signed by (please PRINT name):

Date:

Third Signature (if applicable):

Signed by (please PRINT name):

Date:

08.2023