

SIPP

ISA

Dealing

Junior ISA

Dealing account transfer application form

This is an application form to transfer an existing dealing account into a Dealing Account with us.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at enquiry@youinvest.co.uk.

Please sign and date this application form and return it to

AJ Bell Youinvest
Trafford House
Chester Road
Manchester
M32 0RS

Personal details

Title	<input type="text" value="Dr / Mr / Mrs / Miss / Ms / Other"/>	Surname	<input type="text"/>
Forename(s)	<input type="text"/>	National Insurance number	<input type="text"/>
AJ Bell Youinvest account number	<input type="text"/>		
Permanent residential address	<input type="text"/>		
<input type="text"/>			
<input type="text"/>		Postcode	<input type="text"/>
Daytime telephone number	<input type="text"/>	Email address	<input type="text"/>
Date of birth	<input type="text"/>		

Transferring from another broker

Dealing Account number	<input type="text"/>		
Approximate transfer value £	<input type="text"/>	This is a full transfer	<input type="checkbox"/> This is a partial transfer <input type="checkbox"/>
Broker's name	<input type="text"/>		
Broker's address	<input type="text"/>		
Postcode	<input type="text"/>	Country	<input type="text"/>

Please transfer my holdings, including any cash held on my account to AJ Bell Youinvest.

Name		Date	
Signature			

IMPORTANT NOTE

If your transfer to us includes any funds that are not clean funds, and a clean fund equivalent exists, we will convert these funds into their clean fund equivalent. If there is no clean fund equivalent we will hold the fund in its existing form, but will be entitled to convert it in future if a clean fund equivalent is created.

Assets to be transferred

Please complete the table below with the assets to be transferred along with the approximate cash value.

Please note that any rebates payable to you in respect of investments being transferred will be paid in the form of units following the transfer to AJ Bell Youinvest.

If the table is not completed in full the transfer of assets may be delayed.

Cash element	£
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Assets name/description	SEDOL/ISIN	Units	Value (£)

Please continue on a separate sheet if necessary.

Notes:

If any of the assets detailed above is a Canadian stock, please complete form NR301 and forward it along with this form.

If any of the assets detailed above is a US stock, please complete form W8-BEN and forward it along with this form.