

Nominee Transfer Request

PILLING & Co

INSTRUCTIONS

Please complete this form using BLOCK CAPITALS in black ink, sign and date, and post the original form to us at: **Pilling & Co Stockbrokers, Henry Pilling House, Booth Street, M2 4AF.**

Please note if you are a new Pilling & Co client you will also need to complete our Nominee Application Form.

PERSONAL DETAILS

Title First Name(s) (in full)

Surname Existing Pilling Account Number

Date of Birth / / National Insurance Number

Permanent Residential Address

..... Postcode

TRANSFER FROM EXISTING MANAGER

I apply to transfer my existing account to Pilling & Co from:

Existing Manager Account Number.....

Address

..... Postcode

Email and/or Phone

TO THE EXISTING ISA MANAGER

Please deduct any charges for this service from the cash in my Nominee (*tick one box only*):

- ☐ Please transfer my full Nominee immediately in-specie, including cash, to Pilling & Co.
- ☐ Please liquidate my full Nominee immediately and transfer the cash to Pilling & Co.
- ☐ My Nominee is held all in cash, please transfer this immediately to Pilling & Co.
- ☐ Please transfer part of my Nominee to Pilling & Co (*please include details below or attach separately*).

Cash £.....

Investments

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AUTHORISATIONS

I authorise Pilling & Co Stockbrokers Ltd:

- ✓ To hold my cash, investments, interest, dividends, and any other rights or proceeds from those investments and any other cash. I also understand that if I were to have overseas investments, my assets may be deposited in non-UK jurisdictions where my rights and protections may be reduced.
- ✓ On my written request and within a time frame stipulated by me to transfer (full or part), or pay to me, investments, interest, dividends, rights or other proceeds from such investments or any cash.
- ✓ To hold my investments in CREST, where possible, in the name of St Anns Square Nominees Limited.
- ✓ I agree to Pilling & Co's Terms & Conditions as set out in the "Nominee Brochure" (enclosed or available on request) and General Terms & Conditions.

TRANSFER AUTHORITY

I hereby authorise you to transfer all holdings and cash as detailed above to Pilling & Co who will provide you with registration details. Please also supply them with any information required to expedite the transfer.

Name Signature Date / /



Pilling & Co Stockbrokers Ltd. is Authorised & Regulated by the Financial Conduct Authority No. 652114
Members of The London Stock Exchange | Registered in England and Wales No. 9220456
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