



Applicants must fully complete all sections.

If you have any queries about opening an account please call us on 01892 700836

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

1st Applicant

Title (eg. Mr/Mrs/Dr etc)

Surname

Forenames in full

Permanent residential address

Postcode

Date of birth

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.

Telephone (Home)

Telephone (Work)

Telephone (Mobile)

Email

Account Number

Please ensure you state your account number with us 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.

2nd Applicant – joint accounts only

Title (eg. Mr/Mrs/Dr etc)

Surname

Forenames in full

Permanent residential address

Postcode

Date of birth

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.

Telephone (Home)

Telephone (Work)

Telephone (Mobile)

Email

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



2. Trading Account Transfer

ONLY TO BE COMPLETED BY THOSE WISHING TO TRANSFER A TRADING ACCOUNT

Existing Broker's Details

Name of Company

Correspondence address

Postcode

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 partial as listed below

Name of shares	Number of shares
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
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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 Manager Details

Name of Company

Correspondence address

Postcode Telephone

Existing ISA Account number

Receiving ISA 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 partial as listed below

Name of shares	Number of shares
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Signed Date

On completion please return to:
Jarvis Investment Management Ltd, 78 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS.
Additional forms are available on request.