



Transfer Form

USE THIS FORM TO TRANSFER AN EXISTING ACCOUNT HELD WITH ANOTHER MANAGER
If you do not yet have an X-O share dealing account, you will need to complete an application form as well.
Please use a separate form for each Broker you are transferring from.

I. Transfer Form TO BE COMPLETED BY ALL APPLICANTS

1st Applicant

Title (eg. Mr/Mrs/Dr etc)

Surname

Forename(s) in full

Company Name
(if applicable)

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

If you already have an X-O account number, please enter it here. If you do not yet have an X-O share dealing account, you will need to complete an application form as well.

2nd Applicant - joint accounts only

Title (eg. Mr/Mrs/Dr etc)

Surname

Forename(s) in full

Permanent residential address

Postcode

Date of birth

Telephone (Home)

Telephone (Work)

Telephone (Mobile)

Email

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

2. Nominee Account Transfer ONLY TO BE COMPLETED BY THOSE WISHING TO TRANSFER A DEALING ACCOUNT

Existing Broker's Details

Name of Company

Permanent business address

Postcode Telephone

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 in cash in shares both (✓one box)

1st Applicant

Signed Date

2nd Applicant - joint accounts only

Signed Date

3. ISA Transfer ONLY TO BE COMPLETED BY THOSE WISHING TO TRANSFER AN ISA

Existing ISA Manager Details

Name

Address

Postcode Telephone

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 in cash in shares both (✓one box)

Signed Date

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