



Asset transfer instruction between Nucleus GIAs for Nucleus GIA and Nucleus Modular GIA

Please complete this form in BLOCK CAPITALS and return it by:

- **post** to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- **secure message** via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

Please use this form if you wish to instruct us to transfer assets from one GIA to another within Nucleus.

Please note that both the ceding and receiving products must be the same type of GIA, and both parties (if different) will need to sign this form.

Section 1 - Transferor details (existing holder)

Please transfer the assets listed in Section 3 from:

Title

First name(s)

Surname

Date of birth (DD/MM/YYYY)

Address

Postcode

GIA reference number

Section 2 - Transferee details (new holder)

Please transfer the assets listed in Section 3 to:

Title

First name(s)

Surname

Date of birth (DD/MM/YYYY)

Address

Postcode

GIA reference number

Section 3 - Asset details

Name of investment provider	Fund name	Fund Code e.g. Sedol/ISIN	Policy/plan number	Amount in £ sterling or %

Section 4 - Transferor declaration

I instruct Nucleus to transfer the assets listed in Section 3 above from my GIA to the GIA held by the Transferee named in Section 2.

I accept that once the transfer has been completed, I shall have no claim on these assets (if the receiving product is not my own).

Transferor's signature

Transferor's name

Date (DD/MM/YYYY)


Section 5 - Transferee declaration

I accept the assets listed in Section 3 above into my GIA and agree that they shall be held in my product until further notice.

Transferee's signature

Transferee's name

Date (DD/MM/YYYY)

 03455 212 414

 ask@nucleusfinancial.com

 nucleusfinancial.com

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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