

Account closure

Please return this form to: Selftrade, Account Management, Boatman’s House, 2 Selsdon Way, London E14 9LA.

On completion and submission of this form you will be subject to our Terms and Conditions.

Section A Existing account details you must complete all fields marked * please use CAPITALS

Selftrade account number*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account holder, Lead Investor or Authorised Person							
Title*	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other title	<input type="text"/>	
Surname*	<input type="text"/>						
Forenames*	<input type="text"/>						
Joint Account holder, Club member or Director (if applicable)							
Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other title	<input type="text"/>	
Surname	<input type="text"/>						
Forenames	<input type="text"/>						
Club / Company Account name <small>if applicable</small>	<input type="text"/>						

Section B Selftrade accounts to be closed

Shares ISA	<input type="checkbox"/>	Joint Dealing account	<input type="checkbox"/>	Company Dealing account	<input type="checkbox"/>
Dealing account	<input type="checkbox"/>	Investment Club	<input type="checkbox"/>	All	<input type="checkbox"/>

Please note: A Selftrade Dealing account is automatically opened, at no extra cost to you, when you apply for a Selftrade Shares ISA. If you require all your accounts to be closed please indicate in the box provided.

Closure of Account(s)
Any stock remaining in your Selftrade account at the time of closure can be rematerialised (issued as paper certificate(s) registered into your name), transferred to another provider, or your holdings liquidated resulting in a cash balance.

Please tick one only

Certificate(s)	<input type="checkbox"/>	There will be a charge of £20 for each line of stock that is rematerialised. To pay this charge your account can be funded by debit card, cheque or by using your online banking facility. Rematerialisation will not be initiated until funds are available in your account. Paper certificate(s) will be issued in your name and sent to your address as registered with Selftrade. If there is any cash remaining in your account at the time of closure, Selftrade will transfer it to your nominated bank account.
Transfer to another provider	<input type="checkbox"/>	If you require your Selftrade account to be transferred to another provider there is a charge of £15 per line of stock. Please note that Selftrade can only initiate the transfer of stock to another broker upon receipt of a transfer instruction from the broker in question and subject to the necessary funds being available in your account to cover the exit charges. If there is any cash remaining in your Selftrade Dealing account at the time of transfer, Selftrade will transfer it to your nominated bank account.
Liquidate holdings	<input type="checkbox"/>	I authorise Selftrade to liquidate my portfolio and to transfer the resulting cash balance to my nominated bank account. I understand that I will be liable for dealing and any other charges on the sale of holdings in my portfolio.

Section C Important information

ISA

If you are not transferring to another Plan Manager, any tax credits, interest accrued or dividends credited to your account after the date of closure will be forwarded to your nominated bank account. Please note that both cash and stock movements out of your ISA will be classed as a withdrawal, and will no longer benefit from the tax-efficient environment. You will not be able to subscribe to another stocks and shares ISA, if you have subscribed to your Selftrade Shares ISA within the current tax year.

SIPP

You should contact your Trustee and/or Administrator if you wish to close your SIPP. We will receive closure instructions from them.

Investment Club

Please enclose with this form the relevant Club minutes noting the decision to close the account. The account cannot be closed without this document.

Company Dealing

Please enclose with this form the Board resolution noting the decision to close the account. The account cannot be closed without this document.

Section D Reason for account closure (optional)

Service	<input type="checkbox"/>	Website	<input type="checkbox"/>	Please give details	<input type="text"/>
Product range	<input type="checkbox"/>	Pricing	<input type="checkbox"/>		
		Other	<input type="checkbox"/>		

Section E Declaration

I wish to close the account(s) as stated in section B.

Account holder, Lead Investor or Authorised Person

Signature*

Date*

I authorise the closure of the account(s) as stated in section B (if applicable)

Joint Account holder, Club member or Director

Signature

Date