

SIPP Dealing Account



0845 0700 720
www.selftrade.co.uk

This form should be used when transferring assets held within a SIPP from another broker to Selftrade. This form notifies us that you have initiated a transfer from another broker and that we should expect to receive assets on your behalf. It is important that you and/or your Trustee and Administrator have instructed your existing broker accordingly.

Please return your completed form in the envelope provided (no stamp is needed), alternatively post it to: Selftrade, Account Management, Boatman’s House, 2 Selsdon Way, London E14 9LA.

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

Member’s details		Broker’s details	
Name*	<input type="text"/>	The broker below has been instructed to transfer assets to Selftrade	
Selftrade account number*	<input type="text"/>	Company name*	<input type="text"/>
SIPP plan number*	<input type="text"/>	Address*	<input type="text"/>
Trustee and Administrator’s details		Postcode*	<input type="text"/>
Name*	<input type="text"/>	Phone number*	<input type="text"/>
Address*	<input type="text"/>	Contact person(s)*	<input type="text"/>
Postcode*	<input type="text"/>	Account number*	<input type="text"/>
Contact person(s)*	<input type="text"/>		

Section B Securities to be transferred to Selftrade continue on a separate sheet if necessary

Please detail the securities held with the broker named above.

Security description	Quantity

Please indicate if any special instructions have been given with respect to this transfer

Section C Declaration

I wish to transfer the securities listed above to my Selftrade SIPP Dealing account and have initiated the transfer with the above named broker. This broker should provide any information you require and act upon your instructions.

Signature*

Date*