

Please use this form to give Integrated Financial Arrangements plc a limited power of attorney to facilitate the transfer of a shareholding (including investment trusts) into your Transact Portfolio. Should you require any assistance in completing this form, please consult the Guidance Notes in Section 5, your Financial Adviser or one of our Client Services Managers on (020) 7608 4900.

**Please note: A separate form is required per holding.**

**Please note: Your separate authority will be required to close any account and transfer any residual cash if this is required.**

**1 Applicant Details**

**Transact Portfolio Name (If your Portfolio is held in joint names, please ensure that the names of all investors are entered)**

**Transact Portfolio Number (If known)**

**Facility to Receive Transferred Asset (GIA/ISA/etc)**

**2 Share Transfer Details**

Please use this section to supply the details of the shareholding that you wish to transfer into your Transact Portfolio. You may transfer any shares listed on the London Stock Exchange. Please refer to the Guidance Notes overleaf or the Transact Terms & Conditions for more detail.

Share/EPIC Code	Name of Share (Please enter full description including security type and denomination)	Name of Registered Holder	Number of Shares	Certificated or on CREST?	
				Cert.	CREST
				<input type="checkbox"/>	<input type="checkbox"/>

Please complete the attached CREST Transfer Form.

**3 Limited Power of Attorney Authorisation**

I/we hereby appoint Integrated Financial Arrangements plc as my/our attorney in respect of this transfer. As such I/we authorise my/our attorney to do on my/our behalf all things necessary to transfer ownership of the asset listed on this form into the name of its nominee, Transact Nominees Limited. I/we confirm that where I/we grant this power in my/our capacity as trustee(s) this power shall, in accordance with Section 25(5) of the Trustee Act 1925, only remain valid for a period of twelve months from the date of this deed.

I further request that the result of all dealings in relation to this transfer be forwarded directly to Integrated Financial Arrangements plc.

**Applicant 1 Signature**

**Applicant 2 Signature (if applicable)**

**Applicant 1 Name (please print)**

**Applicant 2 Name (please print)**

**Date**

**Date**

**Witness Signature**

**Witness Signature**

**Witness Name (please print)**

**Witness Name (please print)**

**Witness Address**

  
  


**Witness Address**

  
  


**Country**

**Postcode**

**Country**

**Postcode**

**Date**

**Date**



# Transact Asset Transfer Request and Limited Power of Attorney

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## 4 Previous Registered Address(es)

Please list below any other addresses that may remain the registered address for this investment.

### Previous Address 1


Country

Postcode

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### Previous Address 2


Country

Postcode

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## 5 Guidance Notes

### Share Transfers

#### Additional Documents:

**Certificated:** If the shareholding being transferred is certificated, please ensure you also provide us with the original certificate(s).

**CREST:** If the share being transferred is registered on CREST, please ensure you also provide us with a recent statement showing all details of the shareholding you wish to transfer and complete the attached CREST transfer form.

**Broker/Nominee:** If the share being transferred is held with a Broker or Nominee company, please ensure you also provide us with full account and contact details.

#### Other/Specific Details:

**Share/EPIC Code:** This is the standard share trading code as registered on the London Stock Exchange.

**Name of Share:** This is the full name of the share as registered on the London Stock Exchange. Please include security type and denomination.

**Name of Registered Holder:** The exact name of the holder as listed at the Share Registry and shown on the Contract Note(s).

**Number of Shares:** The number of shares you are transferring to your Transact Portfolio.

**Certificated or on CREST?** Whether the share is certificated or on CREST.

**Income:** The default is for income from your investments to be paid in cash to your Transact Portfolio. If the shareholding being transferred is registered as having a scrip dividend paid or income re-invested, this will be charged on transfer to the default.

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"Transact" is operated by Integrated Financial Arrangements plc Domain House, 5-7 Singer Street, London EC2A 4BQ  
Tel: (020) 7608 4900 Fax: (020) 7608 5300 email: info@transact-online.co.uk web: www.transact-online.co.uk

(Registered office: as above; Registered in England and Wales under number: 3727592)

Authorised and regulated by the Financial Services Authority (entered on the FSA Register under number: 190856)



**CREST  
TRANSFER**

Above this line for Registrar's Use

Counter Location Stamp	Barcode or Reference
LONDON	<b>SDRN</b>

Above this line for completion by the depositing system-user only

Name of Undertaking

Description of Security

Please complete form in type or Block Capitals

Name(s) of registered holder(s) should be given in full; the address should be given where there is only one holder.

If the transfer is not made by the registered holder(s) insert also the name(s) and capacity (e.g. executor(s)) of the person(s) making the transfer.

**PLEASE SIGN HERE**



Full name(s) of the person(s) to whom the security is transferred.

Such person(s) must be a system member.

Reference to the Registrar in this form means the registrar or registration agent of the undertaking, not the Registrar of Companies at Companies House.

Consideration Money £	Certificate(s) Lodged with Registrar (To be completed by Registrar)
Name of Undertaking	Certificate(s) Lodged with Registrar (To be completed by Registrar)
Description of Security	
Amount of Shares or other security in words	Figures
In the name(s) of	Designation (if any)
I/We hereby transfer the above security out of the name(s) aforesaid into the name(s) of the system-member set out below and request that the necessary entries be made in the undertaking's own register of members. Signature(s) of Transferor(s) 1 ..... 2 ..... 3 ..... 4 .....	Balance Certificate(s) Required
A body corporate should execute this transfer under its common seal or otherwise in accordance with applicable statutory requirements.	Stamp of depositing system-user
Transact Nominees Limited Domain House 5-7 Singer Street London EC2A 4BQ	Date
	Participant ID
	Member Account ID

CrestCo Limited is delivering this transfer at the direction and on behalf of the depositing system-user whose stamp appears herein and does not in manner or any extent warrant or represent the validity, genuineness or correctness of the transfer instructions contained herein or the genuineness of the signature(s) of the transferor(s). The depositing system-user by delivering this transfer to CrestCo Limited authorise CrestCo Limited to deliver this transfer for registration and agree to be deemed for all purposes to be the person(s) actually so delivering this transfer for registration.

This form should be used only for a transfer of a certificated unit of security to a CREST member to be held by a CREST member into uncertificated form. It should not be used in the conversion of a unit held by a CREST member into uncertificated form.

The CREST rules require that this form be used for the transfer of a unit of a certified security to a CREST member to be held by that member in uncertificated form. Any such transfer on this form is exempt from stamp duty.