|  |
| --- |
| *Insert your address here*  ------------------------------------------------------------------------ |
| ------------------------------------------------------------------------ |
| ------------------------------------------------------------------------ |
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**TRANSFER**

**AUTHORITY FORM**

|  |
| --- |
| *Insert the contact’s name & address of the*  ------------------------------------------------------------------------ |
| *organisation that your account is being transferred*  ------------------------------------------------------------------------ |
| *from*  ------------------------------------------------------------------------ |
| ------------------------------------------------------------------------ |
| ------------------------------------------------------------------------ |

*(Insert date here)*

Dear *(insert contact name)*

**Re: Transfer of our Portfolio(s)** *(insert your account number(s) here)*

Please accept this letter as formal notification of my/our wish to close my/our account(s) as detailed below and transfer the holdings to King & Shaxson Asset Management Limited.

I/We therefore give you authority to disclose full details of my/our account(s), including information such as holdings and CGT position (realised and unrealised) in order to affect the transfer.

Details of the accounts I/we wish to transfer can be found below:

|  |  |
| --- | --- |
| Name of Fund Manager |  |
| Fund Manager Details | *Email:*  *Phone No:* |
| Account reference(s) |  |
| In specie or cash |  |
| Value |  |
| Notes regarding transfer |  |

We provide permission to liaise with the following contacts regarding this transfer:

|  |  |  |  |
| --- | --- | --- | --- |
| **Contact Person** | **Tel No** | **E-mail** | **Position** |
| Ruemu Abutoh | 020 7426 5985 | ruemu.abutoh@kasl.co.uk | Asset Management Assistant |
| Pershing Securities Ltd\* | Multiple | Multiple | Agent for King & Shaxson Asset Mgt |
| K&S Support Team | 020 7426 5960 | ethical@kasl.co.uk | General Support |

*\* There may be occasions whereby the agent of King & Shaxson Asset Management Limited may need to contact yourselves during the transfer process*

Yours faithfully,

|  |  |  |  |
| --- | --- | --- | --- |
| -------------------------------  Signature of 1st account holder | -------------------------------  Signature of 2nd account holder | -------------------------------  Signature of 3rd account holder | -------------------------------  Signature of 4th account holder |
| -------------------------------  Print name of 1st account holder | -------------------------------  Print name of 2nd account holder | -------------------------------  Print name of 3rd account holder | -------------------------------  Print name of 4th account holder |