



# Internal Asset Transfer - GIA individual/joint



This application can be used to internally transfer investments between existing joint or individual GIA wrappers only. Please ensure that all names of joint holdings are detailed.

Novia will accept the receipt of this form without a signature, **provided it is submitted through the Adviser Zone secure email service.** If you choose to sign the completed form please arrange for the original to be returned to Novia.

If you need assistance completing this form please contact the Client Services Team on 0345 680 8000.

## Investor Details

### Internal Asset Transfer FROM

Investor Number  Wrapper Number

#### Investor name(s)

Forename(s)  Last Name

Forename(s)  Last Name

Please include here any notes regarding this internal asset transfer (please do not use a cover letter for key information)

Please note that as stated in the Charges Schedule there will be an Admin charge per asset internally transferred from this wrapper. The Admin Charge will be deducted from the Cash facility of this wrapper.

### Internal Asset Transfer TO

Investor Number  Wrapper Number

#### Investor name(s)

Forename(s)  Last Name

Forename(s)  Last Name

Please include here any notes regarding this internal asset transfer (please do not use a cover letter for key information)

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### Internal Asset Transfer instructions

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Please list the full name of the assets to be internally transferred.

ISIN/SEDOL	Name of investment	Number of units
<b>Cash</b>		<b>£</b>

### Adviser Declaration (only applicable where the Investor wishes to authorise by signature)

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Novia will accept the receipt of this form without an investor signature, provided it is submitted through the Adviser Zone secure email service. Alternatively, you may ask the Investor to sign the completed form and arrange for the original to be returned to Novia. By submitting this form you are confirming the following:

- / I declare that the information in this form is true and correct to the best of my knowledge.
- / I agree to indemnify Novia Financial Plc against all such claims or losses, including additional tax charges and fines, in the event that the information provided proves to be incorrect.
- / I understand that checks may be performed on this instruction to confirm details are correct.
- / I confirm that I have the Investor’s authority to submit this instruction on their behalf.

Name	
Position	
Firm name	
Firm FCA name	

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Adviser Signature

If you are submitting by post,  
you must sign here.

Date