
UNICORN AIM INHERITANCE TAX PORTFOLIO SERVICE

ISA TRANSFER FORM



Personal Details

You can use this form to transfer existing ISAs into your Unicorn AIM Inheritance Tax Portfolio ISA. If you are transferring more than one ISA, please complete a new 'Authorisation to transfer' for each ISA you are transferring. Additional copies can be found at www.lgbrcapital.com/products/unicorn-aim-iht-portfolio-service/

Title	
First Name	
Last Name	
Permanent Address	
Postcode	
Primary Telephone	
Email Address	
Country of Birth	
NI Number	

Need help? Please contact our team at

020 7071 3910 | sales@lgbrcapital.com

Details of ISA to be Transferred

I have (Tick one box only)	<input type="checkbox"/>	Stocks and Shares ISA
	<input type="checkbox"/>	Cash ISA
Please transfer my ISA (Tick one box only)	<input type="checkbox"/>	In Full
	<input type="checkbox"/>	In Part (Please complete the section below)

ISA Investments to be transferred in part

Please check with your existing ISA Manager that they can accommodate partial transfers. (Please note that any subscriptions made to an ISA in the current tax year must be transferred in full)

Please state how much of your ISA you wish to transfer	£
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Details of ISA Manager

Name of ISA Provider	
Account Number of the ISA to be transferred	
Sort Code (If your ISA is held by a bank)	
Address of ISA provider	
County	
Postcode	

Transfer Instruction

I hereby instruct you to transfer my NISA immediately, including the cash proceeds, together with any interest, dividends, rights and any other cash within my NISA (less any amount you are entitled to keep under the terms of the NISA) to Reyker Securities plc, 17 Moorgate, London, EC2R 6AR. Electronic payments should be sent to:

Sort Code: 60-00-01

Account number: 45751773

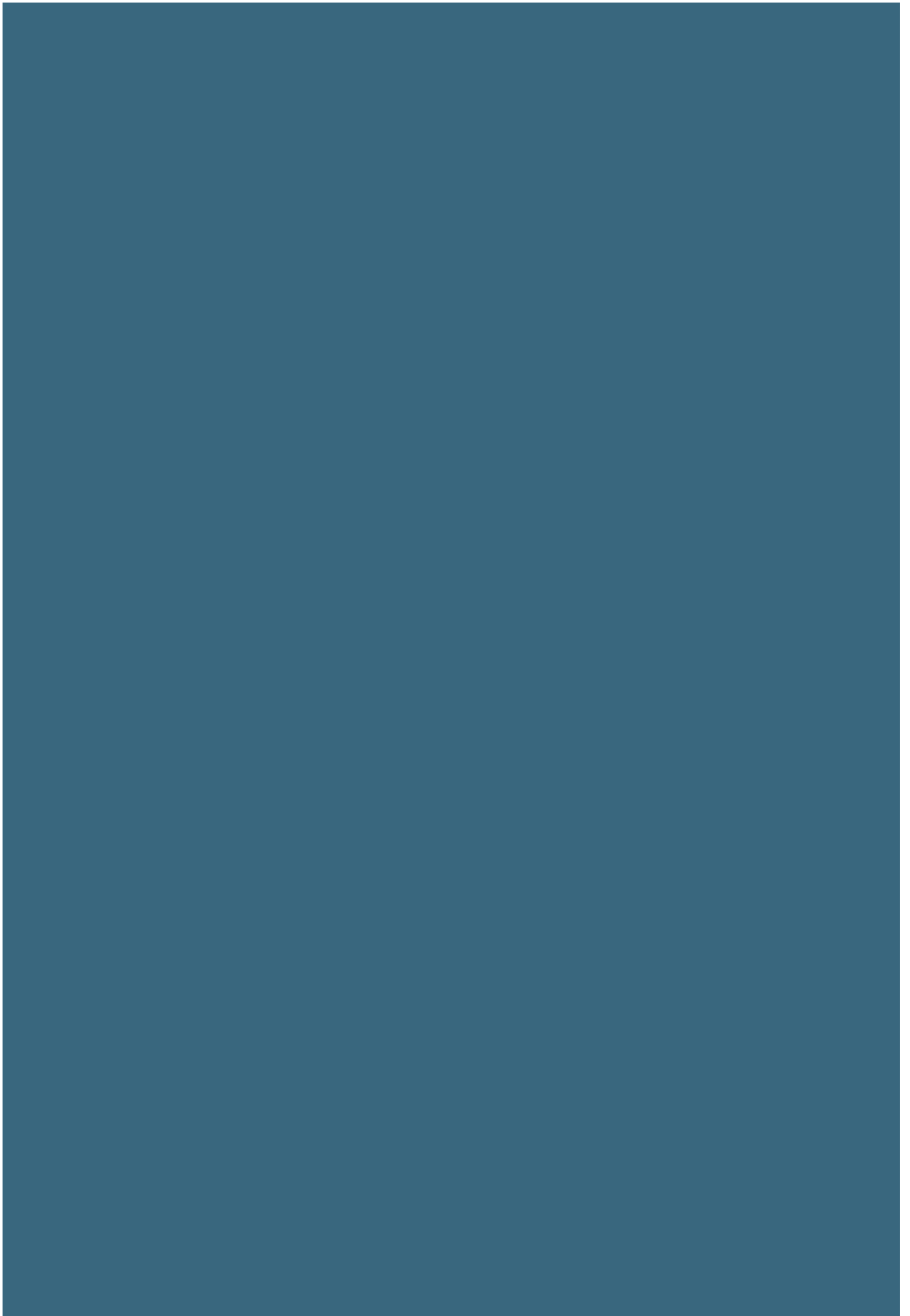
Account name: Reyker Client A/C RE Unicorn

Payments should be sent with my client name as a reference.

Please transfer my NISA once instructions have been received from Reyker to do so. After transfer, all dividends and tax credits due should be made payable to Reyker Securities plc.

Applicant Signature	
Applicant Name	
Date Signed	

This form should be completed in **BLACK** ink and returned to Reyker Securities Plc, 17 Moorgate, London, EC2R 6AR.



Important Information

Your capital is at risk and you may not get back the full amount invested and the tax treatment of your investments depend on your personal circumstances and may be subject to change. Past performance is not a reliable indicator of future results.

The availability of tax reliefs depends on investee companies maintaining their qualifying status.

Investments quoted on AIM are likely to have higher volatility and liquidity risk than securities on the London Stock Exchange Official List.

We recommend that you seek independent investment and tax advice before investing in our products.

Reyker Securities Plc is authorised and regulated by the Financial Conduct Authority and recorded in the Register under reference no 613470.

Contact Details

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London EC4N 6AS

020 7071 3910 | sales@lgbrcapital.com
