

# ACCOUNT TRANSFER AUTHORITY



Please accept this as my/our authority to transfer all the holdings in my/our account\* with you to Hawksmoor Investment Management Limited ("Hawksmoor") in accordance with their instructions. Please complete this Form in BLOCK CAPITALS.

## Existing Manager

|                   |  |
|-------------------|--|
| Name              |  |
| Address           |  |
| Contact Name      |  |
| Account Name(s)   |  |
| Account Number(s) |  |

## Client Details

| Account Title                |                   |                                    |
|------------------------------|-------------------|------------------------------------|
|                              | First Name Holder | Second Name Holder (if applicable) |
| Title (Mr, Mrs, Miss, Other) |                   |                                    |
| First Name(s)                |                   |                                    |
| Surname                      |                   |                                    |
| Address                      |                   |                                    |
| Postcode                     |                   |                                    |

\* Please note that Hawksmoor is not responsible for any Capital Gains Tax liability incurred by the Existing Manager as a result of the transfer

Please arrange with Hawksmoor the transfer of my/our assets and cash to their custody and **provide Hawksmoor with full acquisition details of my/our investments, for Capital Gains Tax purposes, including details of all transactions that have taken place in the current tax year and any losses that are being carried forward.**

|           | First Name Holder | Second Name Holder (if applicable) |
|-----------|-------------------|------------------------------------|
| Signature |                   |                                    |
| Date      |                   |                                    |

**HAWKSMOOR INVESTMENT MANAGEMENT LIMITED**

17 DIX'S FIELD, EXETER, EX1 1QA 01392 410180 [info@hawksmoorim.co.uk](mailto:info@hawksmoorim.co.uk)

OFFICES ALSO IN: LONDON, TAUNTON, DORCHESTER, BURY ST EDMUNDS

Registered Address:

2nd Floor Stratus House, Emperor Way, Exeter Business Park, Exeter EX1 3QS. Company Number 6307442  
Hawksmoor Investment Management Limited is authorised and regulated by the Financial Conduct Authority  
HA2259