

AIM Portfolio to Blackfinch Adapt IHT Service Reinvestment Form



INVESTOR DETAILS (TO BE COMPLETED BY THE APPLICANT)

Use this form to transfer an existing AIM Portfolio to the Blackfinch Adapt IHT Portfolios, either held in your own name, via a nominee, or operated by another manager. We cannot complete the transfer if this form is incomplete. If you wish to transfer more than one Portfolio, complete a separate Transfer Form for each Portfolio you are transferring.

Blackfinch endeavours to use the below form to obtain the requested funds, however it cannot be guaranteed that our request will be successful due to the different transfer requirements of third-party platforms and providers. Please note: This AIM to Blackfinch Adapt IHT Transfer Request Form must be accompanied by a fully completed Blackfinch Adapt IHT Portfolios Application Form, in order for us to action your transfer request.

Title	Forename(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

Permanent Residential Address	Postcode
<input type="text"/>	<input type="text"/>

Date of Birth	Email Address
<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>

National Insurance Number	Blackfinch Designation Number (To be completed by Blackfinch Investments Limited)
<input type="text"/>	<input type="text"/>

EXISTING ACCOUNT MANAGER DETAILS/ NOMINEE DETAILS

Name of Company	Contact Name	Telephone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Permanent Business Address	Postcode
<input type="text"/>	<input type="text"/>

Full Account Name	Account Number
<input type="text"/>	<input type="text"/>

DECLARATION (TO BE COMPLETED BY THE APPLICANT)

Please tick the box which applies to your investment:

☐

I wish to sell down and transfer my entire portfolio

☐

I wish to sell down and transfer my portfolio in part

Estimated value of the transfer

Please note: We can only accept cash transfers NOT In Specie transfers

£

I request that the above account be managed by Blackfinch and hereby authorise you to transfer this account in cash to Blackfinch Investments Limited on their written instruction to do so and provide such information regarding my above specified account which they require. The assets in my current portfolio should be liquidated and the proceeds should be transferred to the Blackfinch client account bank details listed. I understand that liquidating assets may incur costs during the liquidation process which would be deducted by my current provider at the point of sale of the assets before new shares are purchased in the Blackfinch Adapt IHT Portfolios.

Signature of Applicant**Name in Block Capitals****Date**

D	D	/	M	M	/	Y	Y	Y	Y
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BLACKFINCH BANK DETAILS

Account Name	Blackfinch Investments Limited
Account Number	01812668
Sort Code	30-95-41

When sending client money, please include the client's Blackfinch Designation Number and name as the reference.