Please complete this form if you wish to transfer shares you hold in certificated form into your Shareview Dealing ISA. If you have any questions about completing this form please contact our Customer Experience Centre on 0345 300 0430.

ISA regulations do not allow shares to be placed directly into an ISA unless they are coming out of an eligible savings scheme. To move your shares into your ISA the shares will first be placed into your Investment Account and sold, the sale proceeds will be transferred to your ISA and then the same shares will be repurchased within your ISA.

This means that commission will be charged on both the sale and the repurchase of your shares. In addition, 0.5% Stamp Duty Reserve Tax will be charged on the purchase. Any trade of over £10,000 will also incur a £1 PTM levy. Please be aware that the sale of shares is a disposal for Capital Gains Tax purposes. Your shares will be sold and repurchased at different prices due to the bid/offer spread in the market.

Please complete all fields in this form (where applicable).

**Section A  Your personal details**

If you already have a Shareview Dealing Account, please write the account number here: ______________________

If you do not have an account, please open one at www.shareview.com/ISA or call the Customer Experience Centre on 0345 300 0430.

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**Section B  Bed & ISA instruction**

CREST Transfer Forms are available online at www.shareview.com/forms

Step 1. Shares to be transferred to your Investment Account

Please complete this section and enclose the share certificate and a completed CREST Transfer Form in respect of each shareholding

Stock name in full

Number of shares/units

Step 2. Shares to be transferred to your ISA

Please specify the value of shares to be transferred into your ISA £

You can transfer £20,000 less any contributions you have made to any combination of permitted ISAs. Any shares above this value will be retained in your Investment Account;

or

Please specify the number of shares/units to be transferred into your ISA
Section C  Declaration and Authority

Please read this section carefully before signing the Declaration

I authorise you to transfer my investments, as detailed above, to my Equiniti Investment Account with immediate effect.

I authorise you to complete a Bed & ISA transaction by selling the shares in my Investment Account, transferring the funds into my Shareview Dealing ISA and repurchasing the same shares within my ISA. I understand that the following charges will apply: dealing commission (£12.50 for each sale and £12.50 for each repurchase), 0.5% Stamp Duty Reserve Tax on the purchase and a PTM levy of £1 on trades over £10,000. I also understand there will be a difference in the sale and purchase price.

I apply to subscribe to a Shareview Dealing ISA for the tax year 2019/20 and each subsequent year until further notice.

I declare that

[checklist items]

Signature  Date

Section D  Enclosures Checklist

Please use this checklist to ensure that you have enclosed all the documents required for us to complete the Bed & ISA transaction.

Share Certificate(s) for each holding you wish to transfer  [ ]

CREST Transfer Form(s) for each holding you wish to transfer  [ ]

Next Steps

Please return this form to:
Equiniti
PO Box 4605
Aspect House
Spencer Road
Lancing
BN99 6QY

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