

Non-ISA portfolio transfer authority form

To be completed by the client(s).

First client

Full client names

Permanent residential address

Postcode

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Second client

Full client names

Permanent residential address
(if different from the address above)

Postcode

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To (Existing portfolio manager)

I/We hereby request and authorise you to transfer the following portfolio(s) managed by you under account number(s):

to Rathbone Investment Management Limited, Port of Liverpool Building, Pier Head, Liverpool L3 1NW, in accordance with their instructions set out below.

Please also accept instructions from Rathbone Investment Management regarding the liquidation of any investments they may require prior to or during the transfer.

First client

Signed

Date

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Second client

Signed

Date

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