



Transfer Your General Investment Account (GIA)

Let us take care of your GIA transfer

We've made transferring to True Potential Investor quick and easy with our simple GIA transfer form.

Don't worry if you can't find all of the details of your GIA, our dedicated team of experts can work with you to find this information. We'll also look after your transfer from start to finish, doing all the work for you.

We're available on 0800 046 8007 from 8am to 8pm weekdays to help with any questions.

Why Transfer?



Track your GIA 24/7



Top up your account with our award-winning technology, impulseSave®, from as little as £1



Opportunity for greater potential growth by consolidating your accounts

1. Your Personal Details

First Name

Last Name

Date of Birth

Home Address

Post Code

If you need any help with transferring, would like to transfer part of a GIA or are unsure of anything on this form, call our Transfer Team on 0800 046 8007.

2. GIA to Transfer

GIA Provider Name

Account Number

Estimated Value

£

Amount to Transfer

Full Amount

Other (Please Specify)

£

3. Declaration

- I have read and accepted the [True Potential Investments GIA Key Features Terms & Conditions](#).
- I authorise True Potential Investments to arrange for the sale of all assets held in my above named General Investment Account and to the transfer of cash proceeds into my True Potential Investments General Investments Account.
- I have checked if I will lose benefits or guarantees and whether I will incur any penalties and wish to transfer my General Investment Account.
- I have not had, or asked for, personal financial advice relating to this transfer. I am responsible for my decision to transfer, If I am unsure whether this transfer is right for me, I will seek advice.

4. To My Current GIA Provider

- I authorise and instruct you to transfer all assets held in my above-named General Investment Account directly to True Potential Investments.
- I authorise you to release all necessary information to True Potential Investments to enable the transfer of all assets held in my above-named General Investment Account to True Potential Investments.

5. Returning This Transfer Form

Please return this form to:

True Potential Investor, Gateway West, Newburn Riverside, Newcastle Upon Tyne, NE15 8NX

Signature

Print Name

Dated

If you need any help with transferring, would like to transfer part of a ISA or are unsure of anything on this form, call our Transfer Team on 0800 046 8007.

Head Office: Gateway West, Newburn Riverside, Newcastle upon Tyne, NE15 8NX

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