iFAST financial

Internal Transfer Instruction Form

Transfer from	Transfer to
FA Company: _____	FA Company: _____
Acct Number: _____	Acct Number: _____
Acct Type: ☐ Wrap Personal ☐ Non-Wrap Personal ☐ Wrap Joint ☐ Non-Wrap Joint	Acct Type: ☐ Wrap Personal ☐ Non-Wrap Personal ☐ Wrap Joint ☐ Non-Wrap Joint

1) A copy of the recent statement of holdings of the 'Transfer from' account is required.
2) Weighted average cost from the 'Transfer from' account will be reflected in the 'Transfer to' account.
3) Upon transfer of all units, EXISTING RSP will be TERMINATED. Please submit new RSP/GIRO forms for the 'Transfer to' account if necessary.
4) Unit trust dividend reinvestment units credited into the 'Transfer from' account after a full transfer will automatically be sold, with proceeds credited into the Cash Account/client's CPF investment account/CPF Ordinary Account/CPF Special Account/SRS account (whichever is applicable).
5) For transfers to a third party*, the Transferor(s) is/are required to visit our office with their NRIC/passport for verification.
   *Where there are no common account holders in both accounts.
6) All account holders are required to sign in the respective Transferor (FROM) and Transferee (TO) sections.
7) No fees are applicable for the transfer request. For transfers of ALL holdings of a payment method, accrued fees will be deducted from the holdings during the transfer.
8) Account opening documentation is required if Client does not have an existing "Transfer To" account tagged to your FA code. Transfer can only be done between 2 unique iFAST Account.

ACCOUNT HOLDER(S) DECLARATION

I/We, the beneficial unit-holder(s) of the fund(s) identified below, hereby authorise iFAST FINANCIAL PTE LTD to act on my/our behalf to effect the transfer of the funds set out below.

HOLDING DETAILS

Name of Security (in full)	Product Type (UT, Bond, Stock, ETF)	Payment Method (Cheque, OA, SA, SRS)	Quantity

Transferor(s) Details as in account with iFAST FINANCIAL PTE LTD (FROM)	
Signature of Main Account Holder: Name: NRIC/Passport No.: Date:	Signature of Joint Account Holder (where applicable): Name: NRIC/Passport No.: Date:
Transferee(s) Details as in account with iFAST FINANCIAL PTE LTD (TO)	
Signature of Main Account Holder: Name: NRIC/Passport No.: Date:	Signature of Joint Account Holder (where applicable): Name: NRIC/Passport No.: Date:

FA Code	

For Official Use Only	
Created By/Date:	Approved By/Date: