

AiM IHT Service

GENERAL INVESTMENT
ACCOUNT ('GIA')
TRANSFER FORM



General Investment Account Transfer Form

Please note this Application Form contains interactive boxes, to help you fill in the Form online. You have the choice of either filling in this Application Form online or on hard copy. In order to use this functionality please download and open the Form in the latest version of Adobe Acrobat. You must print and sign a hard copy of this Application Form.

This Transfer Form is supplementary to the Stellar AiM IHT Service Application Form and by completing it you agree to the terms set out in the Stellar AiM IHT Service Brochure and the Terms, dated April 2026.

Please Confirm Type of Transfer

Partial Transfer Yes or Full Transfer Yes

If Partial Transfer, please confirm either amount or holding(s) to transfer

Amount in cash £

Specific Holding

Specific Holding

Or

Units/Value

Units/Value

Please attach further details if required.

If Full Transfer, please tick one

Please transfer in-specie

Please sell all investments and transfer in cash

Existing Investment Manager Details

Name of firm
Account no.
Telephone no.
Address
Postcode

Transfer Authorisation by Investor(s) to Existing Investment Manager.

I/We hereby give my/our authority for this transfer to take place.

Name of applicant (or power of attorney)
Signature of applicant (or power of attorney)
Name of joint applicant (or power of attorney)
Signature of joint applicant (or power of attorney)
Date

Please liaise with our client services team (enquiries@stellar-am.com, 020 3195 3500) in respect of the asset transfers.

Please ensure a valuation is sent to us to assist with monitoring and confirmation of receipt of all the investment and/or cash.

Once the asset transfers are complete, please send a closing statement to us.

Get in touch

We're here to help

Investors

We recommend you speak to a Financial Adviser in the first instance, as we cannot offer investment or tax advice.

If you have any other questions please contact us on 020 3195 3500 or email us at enquiries@stellar-am.com

For further information, please visit www.stellar-am.com

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AIM-TR-GIA-0426