


# Incoming Transfer of Investment Portfolio

Please email this form to [clients@degiro.co.uk](mailto:clients@degiro.co.uk) and include **14738/302** in the subject line. Additionally, please include a proof of account ownership with your other bank. This may be a screenshot or an account statement showing your name and account number at your other provider.

## Positions to be transferred (Please complete the table)

Position	Product Name	ISIN	Quantity	Exchange
<i>Example</i>	<i>Example PLC</i>	<i>GB0123456789</i>	<i>10</i>	<i>LSE</i>
1				
2				
3				
4				
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23				
24				
25				
26				
27				
28				
29				
30				

 If you would like to transfer more than 30 positions, please submit another transfer request.

## Cash balance to be transferred (Please fill out accordingly if applicable)

EUR \_\_\_\_\_ | from account \_\_\_\_\_ |  
 Amount Account number/IBAN

USD \_\_\_\_\_ | from account \_\_\_\_\_ |  
 Amount Account number/IBAN

GBP \_\_\_\_\_ | from account \_\_\_\_\_ |  
 Amount Account number/IBAN

CHF \_\_\_\_\_ | from account \_\_\_\_\_ |  
 Amount Account number/IBAN

## Securities credit to be transferred (Please fill out accordingly if applicable)

GBP \_\_\_\_\_ |  
 Amount

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## Account details: DEGIRO account (Please complete all fields)

\_\_\_\_\_  
Username

\_\_\_\_\_  
Full name of the account holder

\_\_\_\_\_  
Full name of the joint account holder (if applicable)

## Account details: Sending account, your bank/broker/financial institution (Please complete all fields)

\_\_\_\_\_  
Name of the financial institution

\_\_\_\_\_  
Account number


\_\_\_\_\_  
Full name of the account holder


\_\_\_\_\_  
Full name of the joint account holder (if applicable)


\_\_\_\_\_  
E-mail address of broker


\_\_\_\_\_  
This account is from the following country:

## Remarks on the portfolio transfer to DEGIRO

 Not transferrable: Purchase prices, accrued loss balances & products that are unavailable at DEGIRO.

 Transfers typically take 4-6 weeks to complete.

 The fee per position (i.e. per row in the above table) is EUR 10.00.

 Change of Beneficial Ownership excluded: All account holders are mentioned & match in both accounts in name and number.

 **I/we confirm the completeness and accuracy of the information & accept the aforementioned conditions of the portfolio transfer.**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature: Account holder

\_\_\_\_\_  
Signature: Joint account holder (if applicable)

**Please sign this form by typing your name into the corresponding signature field.**