

CSN – Flexible Stocks & Shares ISA Transfer-In



This form is for transferring shares held in your name from a Corporate Sponsored Nominee (CSN) administered by Equiniti into an EQi Flexible Stocks & Shares ISA.

If you are transferring shares that are not from an SAYE Maturity or if the 90 day period has lapsed, you would need to complete the Bed & ISA process. Please complete the form and submit to the return instructions, Bed & ISA forms can be found on the website <https://eqi.co.uk/info/forms>

Please contact the Customer Experience Centre on **0345 0700 720** if you have any questions about completing this form or process. **Please complete all the fields in this form (where applicable).**

Section A: Your personal details

The name(s) registered on the CSN account must exactly match the name(s) registered on your Dealing Account.

Please provide your EQi account number

Title Mr Mrs Miss Ms Other

First name(s)

Last name

Date of birth

Day Month Year

National Insurance number

Postal address

Telephone number

Section B: Transferring your shares

CSN Shareholder reference
(which can be found on your
CSN statement)

Name of company you hold
shares in

Description of security held
(eg; Ord shares 10p)

Please indicate the the value
of shares to be transferred **£**

Or

Transfer all of my CSN shares

Shares from eligible employee schemes

Ensure that you have enclosed all employee scheme documents such as the 'Notice of Exercise' or 'Notice of Award', evidencing that this transfer is within 90 days of the shares ceasing to be subject to the plan or exercise of option date.

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Section C: Declaration

I **authorise you** to request transfer of shares from my CSN account into my EQi Flexible Stocks & Shares ISA.

I **confirm that** the personal details that I have completed in Section A will not change the beneficial ownership of the shares transferred into the EQi Flexible Stocks & Shares ISA.

If you complete the 'CSN' to EQi Flexible Stocks & Shares ISA Application, this form is not required.

Sign the form

To sign this form you may provide an electronic signature. You can do this via your Adobe Acrobat Reader DC, or Docusign which is a free of charge service.

Instructions to create an electronic signature are as follows:

1. On Adobe open the file, or on Docusign upload the file
2. In the editor, select sign and draw your signature. Then place your signature in the signed box below
3. Save the document and follow the return instruction in the 'Next Steps' section.

Please note, we cannot accept a typed or written name in the box below. Alternatively, you may print and sign the document.

Signed

Date

Day

Month

Year

Next steps

1. You will receive a notification when your transfer has been initiated.
2. Once the transfer has been completed, you will receive notification that the stock is available in your EQi ISA.

To return your form, please send to forms@eqi.co.uk, this and all related documents must be received from the registered email on your EQi account (or match the email address submitted on your EQi ISA application form). Forms received from an unregistered email account will not be actioned, to assist with this please login to your account and ensure all contact details are correct.

Alternatively you can post the form to: **EQi, PO Box 4923, Worthing, BN99 6SF**