

Cash Transfer Between Accounts Form

Investment Services



Please Note: This form has been optimised for digital use to avoid as much paper waste as possible. Please download and save this file locally on your device that you are using and open with Adobe Acrobat.

You do not need a paid account, but you may need to configure your digital ID for signing (please follow the 'on screen' steps when using Adobe Acrobat for full details on how to do this).

Please ensure there are sufficient available funds in your trading account before sending this completed form to us for execution. Should you need to disinvest to make funds available, please send your dealing instructions to DealingGroup@capital-iom.com. Once the proceeds have settled, you may submit your Cash Transfer Between Accounts Form.

You must maintain a minimum cash balance equivalent to 6 months account fees after the transfer is made.

All fields must be completed clearly and accurately. Any missing information may cause delays when processing your request.

Cash transfers can only be processed between accounts held by the same account holder. Transfers to third-party owned accounts are not permitted via this form.

Once signed, please email your completed Cash Transfer Between Accounts Form to clientsupport@capital-sa.com

1 CIL Portfolio Source Account Details (account cash is transferred from)

Account Portfolio Name:

Account Portfolio Number:

2 CIL Portfolio Destination Details (account cash is transferred to)

Account Portfolio Name:

Account Portfolio Number:

3 Cash Transfer Details

Amount in Figures:

Amount in Words:

Currency: ☐ GBP ☐ USD ☐ EUR ☐ ZAR ☐ Other - please specify:

Reason for Transfer:

Cash Transfer Between Accounts Form

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4 Authorised Signatures

Once signed, please email your completed Cash Transfer Between Accounts Form to clientsupport@capital-sa.com

First Authorised Signatory:

Print Name:

Date:

 / /

Second Authorised Signatory:

Print Name:

Date:

 / /

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