

Please complete all sections. Once complete, email to accountclosure@credogroup.com

Section I – Portfolio Details

Portfolio

Portfolio Number & Name	
Custodian Account Number	
FI Name (if applicable)	
Contact Name & Email Address to Receive Updates	
Account to Close	<input type="radio"/> GIA <input type="radio"/> ISA <input type="radio"/> JISA
Reason for Closure	

Section II – Asset transfer

Summary

Total Number of Lines to be Transferred	
Change of Beneficial Owner? If Yes, please note the transfer may be subject to Stamp Duty / Local Taxes	<input type="radio"/> Yes <input type="radio"/> No

Complete the relevant subsection below

Internal Transfer

Account Details

Account Number & Name Transferring to	
Transfer of Securities at	<input type="radio"/> Market Value <input type="radio"/> Book Cost

External Transfer Out

New Provider Details

Name	
Contact Number	
Contact Email	
Reference / Account Number	

****Please provide all necessary bank details**

Notes	
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Section III – Declarations and Signatures

We confirm that we have authority from the Account Holder to act on their behalf

Name	Signatory	Date
Name	Signatory	Date

[Click to submit to Account Closures](#)