



Internal Asset Transfer- GIA individual/joint

We're currently rebranding from Novia to Wealthtime. You'll notice that some of our products and services still use the name Novia while we're transitioning over to the new name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

This application can be used to internally transfer investments between existing joint or individual GIA wrappers only. Please ensure that all names of joint holdings are detailed.

We will accept the receipt of this form without a signature, provided it is submitted through the Adviser Zone secure email service. If you choose to sign the completed form please arrange for the original to be returned to us.

If you need assistance completing this form please contact the client services team on 0345 680 8000.

Investor Details

Internal Asset Transfer from

Investor number: Wrapper number:

Investor name(s)

Forename(s): Forename(s):

Last name: Last name:

Please include here any notes regarding this internal asset transfer (please do not use a cover letter for key information).

Please note that as stated in the Charges Schedule there will be an admin Charge per asset internally transferred from this wrapper. The admin Charge will be deducted from the Cash facility of this wrapper.

Internal Asset Transfer to

Investor number: Wrapper number:

Investor name(s)

Forename(s): Forename(s):

Last name: Last name:

Please include here any notes regarding this internal asset transfer (please do not use a cover letter for key information).

