

Saga Share Direct

Third Party Transfer Form

Please use this form when transferring stock between two Saga Share Direct accounts and when transferring certificates to an account held with us where a change in beneficial ownership is required. If the transfer is a gift, please complete the declaration below.

Details

Please tick one of the following boxes to indicate the type of transfer required:

Transfer between Saga Share Direct accounts

Transfer from certificate to a Saga Share Direct account

Quantity	Stock Description (as detailed on your share certificate or portfolio valuation)	Notional Transfer Value (if known)

Please continue on a separate sheet if necessary.

Declaration

I/we certify that no chargeable consideration is given for the transfer for the purposes of Stamp Tax/SDRT.

I/we understand that a transfer of shares between spouses is free of Capital Gains Tax but that transfers between other parties may be subject to tax.

I/we understand that it is my/our responsibility to notify HM Revenue & Customs (HMRC) as appropriate.

Transfer from:

Name/s:

Account Number:

Signature 1:

Signature 2:

Date / /

Transfer to:

Name/s:

Account Number:

Signature 1:

Signature 2:

Date / /