

Gifting shares and transferring cash to another person

If you would like to gift shares and cash you hold in a Share Account to another Share Account customer, simply complete this form and return it to us.

Declaration by transferor (the person making the gift)

Customer reference Account number

I/we (full names of account holders)

hereby instruct The Share Centre to transfer the under-mentioned investments and/or cash amounts by way of a gift to the ownership of

which, in respect of any shares, being a conveyance or transfer operating as a voluntary disposition inter vivos for no consideration in money or money's worth nor any consideration referred to in S.57 of the Stamp Act 1891 (conveyance in consideration of a debt etc.), fall within Exemption Category L in the schedule to the Stamp Duty (Exempt Instruments) Regulations 1987.

Investment name:	No. of shares
Cash (amount in words):	£

Payment of gifting fee: (please tick one box only)

A fee of £5 per investment is payable for gifts other than those between spouses;

- I attach my cheque for £ in respect of the gifting fee of £5 per investment **OR**
- Please deduct the fee payable from my account number **OR**
- This is a transfer between spouses for which no fee is payable. Where either person named on this form uses their maiden, rather than married name, please enclose a copy of your marriage certificate.

Closure of account:

If you wish to close your account please tick the box below.

- Please close my account and return any cash balance to my personal bank account. (If necessary, please complete a bank details form)

1st Signature Date

2nd Signature Date

Declaration by transferee (the person receiving the gift)

Customer reference Account number

I, (full name)

hereby accept the above mentioned gift(s) from

for inclusion in my account being, in respect of the transfer of shares, in accordance with Stamp Duty Exemption Category L.

Signature Date

Important information

Any incentives attached to the shares will be lost upon gifting and are not transferred. However the transferee will be entitled to any new share incentives that are offered.

The gifting of shares and/or cash may have tax implications for the transferor and/or the transferee. If in doubt you should seek appropriate independent advice.

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