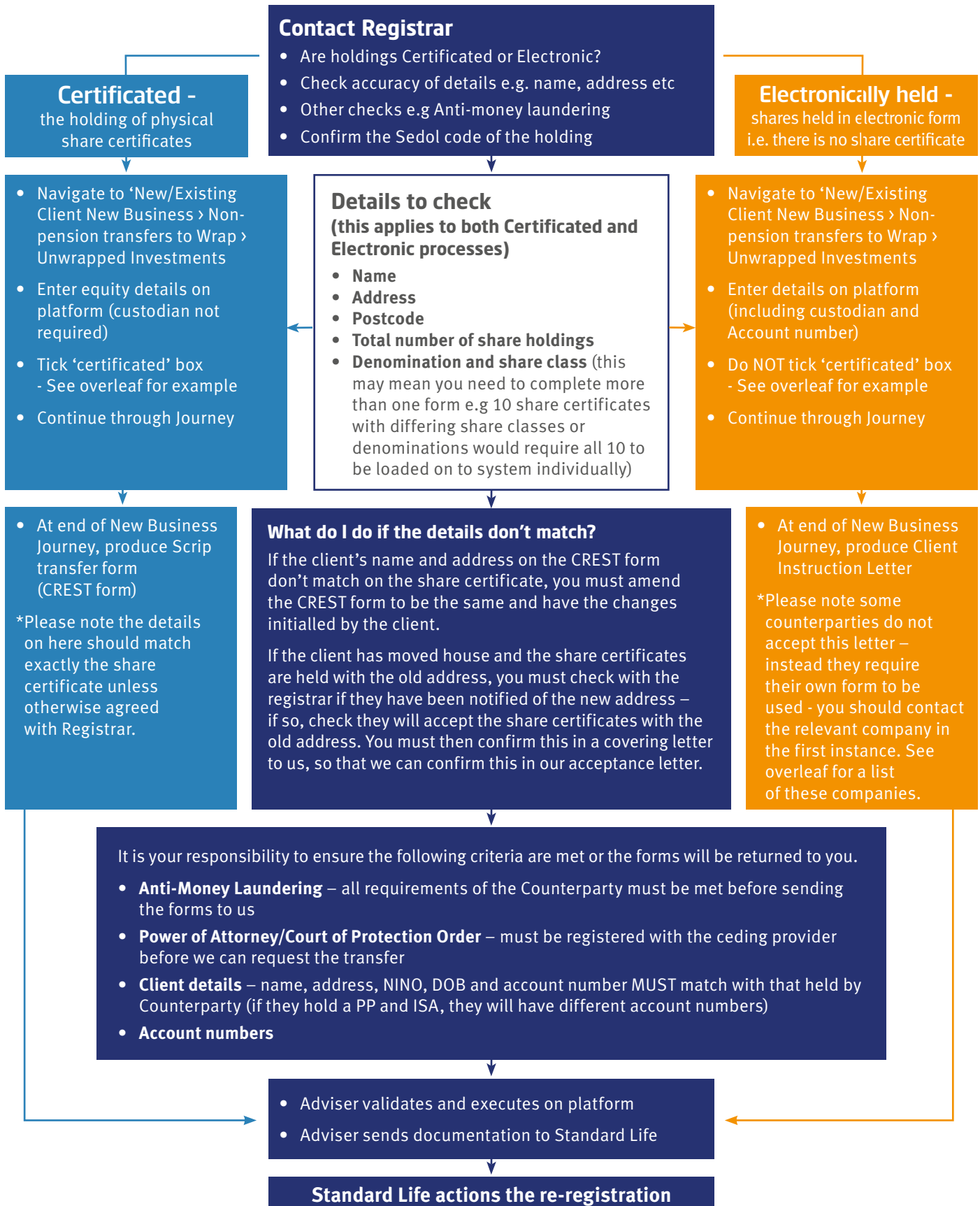


Equities transfer guide

This guide aims to help you with the equities transfer process on Wrap. There are two different processes to follow dependent on whether the shares are **certificated** or are **electronically-held**.



Entering details on platform

The New Business Journey will take you through the process when you get to this screen

This example applies to both Certificated and Electronic held equities

Note- Cash cannot be transferred directly into the Personal Portfolio, but can be deposited in Wrap Cash instead.

* Current Custodian [View/Edit Current Custodian Details](#)

Electronic re-registration supported?

* Account Number at Custodian:
This transfer will be processed more quickly if the account number is entered

* Are there any certificated shares/equities included in the transfer? Yes No

If a combination of certificated investments and non certificated investments – then a separate transfer must be submitted for each.
Please ensure that the certificated numbers are provided below. Once the transfer is completed the shares will be held electronically

Find Account

Companies that do not accept Client Instruction Letter

The following companies require you to complete their own form. You must contact the relevant company to obtain this form, then once completed, send to Standard Life to begin the transfer process.

Counterparty	Name of form	Telephone number
Equiniti	E-form	0871 384 2030
Banco Santander (Equiniti)	E-form (can also be obtained from Santander Shareholder website)	0871 384 2030
Computershare	Uncertificated Withdrawal form	0370 702 0003
IAG (Intercontinental Airlines Group)	Uncertificated Withdrawal form	020 8867 6200
Ocado (Capita)	Transfer Out form	0871 664 0300

Exit fees

Check if there are any Exit fees. If Exit fees apply, please send the cheque to Standard Life Savings – payable to the Registrar. Do not send direct to the Registrar as this will delay the process.

Ensure that the client name, address, postcode, NINO and DOB matches that held with the Counterparty/Fund manager.

Do not send:

- tax vouchers
- statements
- any other documentation from third parties

If you have any queries, please contact us on 0345 279 1001