

## SIPP additional, change or closure of investment partner

### Client details

This form should be used to add a panel investment partner, to re-register investments from one panel investment partner to another, or to close an investment partner where funds are held in cash. If you would like to add an off-panel investment manager, please complete the off-panel investment instruction form.

Alternatively if you would like to add Funds & Shares Service XO then please complete the Funds & Shares Service XO account opening form. Please also ensure the Funds & Shares Service XO account opening form has been submitted prior to requesting a re-registration.

AJ Bell Investcentre account number <b>SCC</b>	Client name
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### Add investment partner

Please specify your chosen new investment partner(s). You should only complete these boxes if you wish to use one or more of our panel options.

New investment partner	New investment partner
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### Change investment partner

Use this section if you wish to re-register investments held with an existing investment partner to another investment partner (new or existing). You must specify the investment partner at which investments are currently held, and the investment partner to which the investments will be re-registered. Both investment partners specified must be on our panel of investment partners.

When switching assets to the Funds & Shares Service all assets must be re-registered into either the Funds & Shares Service or Funds & Shares Service XO. Once the transfer is complete assets can then be moved between the Funds & Shares Service and Funds & Shares Service XO accounts as required.

Current investment partner	Account reference
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If you wish to close this account once all investments have been re-registered, please tick this box.

Please specify your chosen new investment partner

New investment partner
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**The 'Investments to be re-registered' section overleaf must be completed for all investment partner switches to the Funds & Shares Service and Funds & Shares Service XO. It must also be completed for partial switches to other investment partners.**

### Closure of investment partner

Use this section if you wish to close an investment partner where all funds are held in cash. Please contact the investment partner directly to disinvest funds.

Investment partner	Investment partner
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Note: you may also need to complete an investment management agreement with the appropriate investment partner.

### Adviser's declaration

I confirm that instructions detailed on this form are correct and are made with the full knowledge and consent of the SIPP client quoted in the 'client details' section.

Once you have completed and signed the form, please scan it and email to [enquiry@investcentre.co.uk](mailto:enquiry@investcentre.co.uk).

Name	Date
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Signature
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## **Investments to be re-registered - transfers to Funds & Shares Service, Funds & Shares Service XO and all partial transfers**

Please ensure the schedule below is completed. If the table is not completed in full, the re-registration of assets may be delayed.

When switching assets to the Funds & Shares Service all assets must be re-registered into either the Funds & Shares Service or Funds & Shares Service XO. Once the transfer is complete assets can then be moved between the Funds & Shares Service and Funds & Shares Service XO accounts as required.

Please note that any rebates payable to the client in respect of investments being re-registered to the Funds & Shares Service will be paid in the form of units following the switch to the Funds & Shares Service.

Assets name/description	SEDOL or ISIN reference	Units/shares	Value (£)

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