



An online community where individual investors can share experience, gain knowledge, and access resources to build wealth

### Internal Transfer of Securities/Funds Form

This form is to be used by customers to transfer securities and/or funds from one DriveWealth account into another DriveWealth account. Transfers made to beneficiaries other than the current account holder are considered third party. As a policy, DriveWealth will not make third party transfers.

The information provided for the accounts below must match the account information on file.

**Transfer Assets From:**

DriveWealth Account #: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Customer Name(s): \_\_\_\_\_

\_\_\_\_\_

**Transfer Assets To:**

DriveWealth Account #: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Customer Name(s): \_\_\_\_\_

\_\_\_\_\_

**(For Funds):**

Please indicate the amount of the Transfer:

**Full Transfer** (Transfer all funds in account)    **Partial Transfer** Amount: US\$ \_\_\_\_\_

**(For Securities):**

**Full Transfer** (Transfer all securities in account)    **Partial Transfer** \_\_\_\_

Number of Shares	Description of Security	Symbol / Cusip

Do you want to close the DriveWealth account from which the funds are being transferred FROM? Yes) \_\_\_\_ No) \_\_\_\_

I/WE hereby authorize the above transfer of securities/funds from and to the DriveWealth accounts identified above.

Customer Signature \_\_\_\_\_ Date (mm/dd/year) / / \_\_\_\_

Print Name \_\_\_\_\_

**(For Joint Account Only)**

Customer Signature \_\_\_\_\_ Date (mm/dd/year) / / \_\_\_\_

Print Name \_\_\_\_\_

-----**FOR BROKER USE ONLY**-----

Office Use Only: Form Completed Date: / / \_\_\_\_ Completed By (Initials): \_\_\_\_\_

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