

Crest Transfer Forms

Downloads and Guidance



WHERE DO I GET THE FORM?

You can download a copy of the form by [clicking here](#).

(Please note that the file is in PDF format and you will need Acrobat reader to open the file. If you do not have Acrobat reader installed on your computer you can download it from their website at <https://get.adobe.com/uk/reader/>)

WHAT DETAILS DO I NEED TO PUT ON THE FORM?

In most cases, the only fields you will need to fill in are;

- **Name of Undertaking** : e.g. Tesco PLC
- **Description of Security** : e.g. Ord 50p
- **Please complete form in type or in block capitals** : write the total holding in words e.g. ONE HUNDRED
- **Figures** : write the total holding numerically e.g. 100
- **In the Name(s) of** : provide the FULL name and address of the owner(s) known to the registrar
- **Please sign here** : all owners should sign the form where indicated
- **Member Account ID** : Insert your SVS account number

YOU SHOULD ALSO NOTE THE FOLLOWING

- You need to fill in **one CREST transfer form for each type** of security
- If all certificates are for the same stock then you only need to fill in **one form**. The only exception to this would be if they have different designations. (Most holdings will not have any associated designation.)
- Investment club holdings must be held in the names of at least 2 of the members
- The certificates must be in the name of the SVS account holder or the account holder's spouse. If the certificates are in a spouse's name then the CREST transfer form should be filled in by the spouse. He or she must also write a letter telling us the certificates are being 'gifted' to the SVS account holder.

WHAT DO I DO WITH THE FORM ONCE I'VE FILLED IT IN?

We advise that when sending certificates and Crest Transfer Forms to us that they are sent via recorded delivery to:

Settlements Department
SVS Securities PLC
20 Ropemaker Street
London
EC2Y 9AR