

Do you have an existing portfolio and do you want to transfer it to MeDirect? We make switching easy and fast. Go through the steps below and we will get started for you right away!

- 1 Fill in this form to transfer your securities from your current provider to your MeDirect investment account. If you want to transfer securities from more than one provider, fill out a separate form for each provider.
- 2 Send the most recent position overview of the securities you want to transfer. Don't want to transfer all the effects on this overview? Then clearly mark which securities should be transferred and which should not.
- 3 Send the completed form and the most recent position overview scanned to [info@medirect.nl](mailto:info@medirect.nl).

#### Important to know:

- At MeDirect you cannot invest in complex securities as defined in Directive 2014/65/EU (MIFID II). Such products cannot therefore be transferred. Examples include options and turbochargers.
- We do our utmost to take over all requested securities from the supplying bank. However, we cannot guarantee that every effect can be accepted. MeDirect has the right to refuse certain securities.
- We reimburse the transfer fee charged by the supplying bank up to a maximum of 0.50% of the value of the portfolio.
- Please note that during the transfer it is not possible to sell the securities. So you run a price risk during the transfer. As soon as we receive the securities, we will book them directly into your account.

## Transfer form securities

Account holder	
First and last name	
Account number	

Bank providing data	
Name	
Address	
Email	
Telephone number	

I authorize my investment service provider, as described above, to transfer the securities listed in the attached statement and all cash held on my behalf to my investment account with MeDirect.

I understand that MeDirect has the right to refuse the transfer of one or more securities. I hereby declare that this transfer does not constitute a change in the beneficial owners.

By signing this form, you give MeDirect permission to share your data with the supplying bank. The above does not exclude that there are conditions that are previously stipulated in the *General Terms and Conditions* and the *General Terms and Conditions Investment Services* of MeDirect.

-----  
Account holder signature

Date: