

# Saga Shareholder Account

## Change of nominee form

This form is to transfer your shares from the Saga Shareholder Account (SSA) to another nominee, with no change in the underlying beneficial ownership of the shares. If the shares will not be owned by the same individual/s once transferred to your nominee, please contact us.

Write in block capitals and do not use correction fluid on this form – if you make a mistake, put a line through it and initial the change.

Your Investor Code is an 11 digit number which can be found on any recent communication such as a letter or statement.

### Part 1 – Details of the shareholding

Investor Code (IVC)

Type of shares



We cannot transfer part of your holding, so only complete this form if you want to transfer all of your shares.

### Name(s) of shareholder(s)

Please complete the names of all shareholders in full - do not use initials. Also complete the address for the holding. Where the transfer is not being made by the shareholder, insert the names and the roles of those making the transfer (e.g. executor).

Write all details in full as they appear on the share register - you can check this on any letter, statement or dividend confirmation we've sent you. If you are filling in the form as a personal representative or power of attorney make sure the relevant legal documents have already been registered or send them with the form.

Holder 1

Registered address

Holder 2

Holder 3

Holder 4

All shareholders or legal representatives need to sign the form.

### Part 2 – The transferor - the person / people transferring the shares

I/We hereby request a transfer from the Saga Shareholder Account (as defined in the terms and conditions) of the above shares stated out of my/our name(s) to the CREST participant detailed below. I/We request Link Market Services Trustees to make such entries in the share registrar as are necessary to give effect to this transfer. I/We confirm that this transaction is not subject to Stamp Duty Reserve Tax.

By ticking this box, I/We also confirm the shares will continue to be owned by the same person(s) when transferred to our nominee/broker and this transfer does not represent a change in beneficial ownership.

Signature 1.

Signature 2.

Signature 3.

Signature 4.

This transfer form can only be used if there is no change in beneficial ownership of the shares. If the shares will not be owned by the same person / people once transferred to your nominee, please contact us.

**Please turn over to continue the form**

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Please complete all of the details in this section so that we can contact your chosen nominee and arrange to transfer the shares to them.

Make sure that your nominee is aware of the transfer - you may want to send them a copy of this form.

If we are unable to contact your nominee using the details you provide, or if they are unaware of the transfer and unable to accept the shares from us, we will need to reject the form.

Please remember to enclose a cheque for the administration fee.

#### Part 3 – The transferee - the nominee / broker the shares are being transferred to

Full name and address of the nominee/broker the shares are being transferred to. Please complete the full details and provide a contact name and number.

1.	<input type="text"/>
2.	<input type="text"/>
3.	<input type="text"/>
4.	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	Postcode <input type="text"/>

Account number	<input type="text"/>
CREST participant ID and member account	<input type="text"/>
Contact name at transferee	<input type="text"/>
Phone number of transferee	<input type="text"/>

The fee for transferring the shares to another nominee using this form is £15.00. Please return the completed form with a cheque made payable to 'Link Market Services Trustees Limited'.

It can take up to ten days to complete this transfer, or longer if your nominee requests an extended settlement date. We may also need to contact you to carry out identity checks.

If you are selling your shares, instead of transferring the holding to your broker you may want to consider using Saga Shareholder Services dealing service provided by Link Asset Services. For this service contact us on 0800 121 7690 (from overseas +44 (0) 333 300 1582). Calls to Freephone numbers will vary by provider. Calls outside the United Kingdom will be charged at the applicable international rate. We are open between 08:00am - 4:30pm, Monday to Friday excluding public holidays in England and Wales.

This letter has been issued to you by Link Asset Services, a trading name of Link Market Services Trustees Limited and Link Market Services Limited. Link Market Services Trustees Limited (registered in England and Wales No. 2729260) provides regulated, share dealing and share plan services and Link Market Services Limited (registered in England and Wales No. 2605568) provides other related registration services. Not all share plan activity is regulated. Link Market Services Trustees Limited is authorised and regulated by the Financial Conduct Authority. The registered office of each of these companies is The Registry, 34 Beckenham Road, Beckenham, Kent BR3 4TU.

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