



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

External Transfer of Securities Form

This form is to be used by customers to conduct a partial transfer of securities from your DriveWealth account into another brokerage account. This form should *not* be used to transfer assets internally between DriveWealth accounts. For full account transfers to other brokerage firms please use the Customer Account Transfer Form provided by the receiving brokerage. Transfers made to beneficiary other than the sending account name 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:

DTC #: _____
Firm Name: _____
Beneficiary Account #: _____
Account Name: _____
Additional Details: _____

Securities to be delivered:

Number of Shares	Description of Security	Symbol / Cusip

I/WE hereby authorize the above transfer of securities from the DriveWealth account identified above to the brokerage account 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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