



Transfer - Internal

Use this form to transfer assets between accounts held at the same firm. Transfers can be processed between different account types; however, this form cannot be used for any IRA or retirement account type. Once complete, submit this form to your introducing broker/RIA, who will submit it to DriveWealth for processing.

Transfer From (Delivering Account)		Transfer To (Receiving Account)	
Firm Name		Firm Name	
Account Number		Account Number	
Account Title		Account Title	
Account Type		Account Type	

*If you require additional lines to transfer, please include as page 2, an Excel file utilizing the same fields as the header suffices.

Please select an option below:

Full Transfer of All Securities and Cash (Check here if you want the delivering account closed)

Partial Transfer of Securities and/or Cash as detailed below*

***Use this section to indicate specific share amounts and/or cash to be transferred**

Security Name	Security Symbol or CUSIP	Quantity

*If you require additional lines to transfer, please include as page 2, an Excel file utilizing the same fields as the header suffices.

Cash Amount (US Dollars): \$ _____

By signing this form, you authorize DriveWealth to complete a transfer of your assets. You acknowledge and accept any fees or taxes associated with this transaction. If any account owner is losing ownership of any asset in the account, that person is required to sign this form, which acknowledges they understand they will no longer have access to, or ownership of, the assets.

Account Owner Signature Date

Account Co-Owner Signature (if applicable) Date