

**Transfer Department  
Source Software Ltd  
Drake House  
Plymouth Rd  
PENARTH  
CF64 3TP**

**[NB: This form should be printed on your company letterhead,  
then completed in full and returned to the address opposite]**

Today's Date:

## **Instruction to Transfer Authority**

Please transfer the attached list of clients from the Current Broker to the New Broker as named below.

### **Current Broker**

Name  Company  Source Broker No(s)

### **New Broker**

Name  Company

All servicing, renewal commission, clawbacks and liabilities are to be transferred from the Current Broker to the New Broker with effect from\*  Please do not transfer any clients not on the list attached.

By order of,

*[Signature of Director/Proprietor - pp does not constitute authorisation]*

Name of Signatory:

Position in Company:

\* NB: The effective date cannot precede the date of writing. The list of clients must be signed and dated.