

Transfer Request Form

Use this form to transfer your holdings to a different Investor Account type or to another investor. Once completed, please send this document to transfers@seedinvest.com and a member of our team will review your request. We will reach back out if more information is required.

I. TRANSFERRED INFORMATION	
Investor's Legal Name (John Doe)	Investor Account Type (Personal, Trust, Company)
Investor Account Name (If personal, use Investor's Legal Name)	Email Address (john.doe@seedinvest.com)

II. TRANSFEREE INFORMATION	
Investor's Legal Name (Jane Doe)	Investor Account Type (Personal, Trust, Company)
Investor Account Name (If personal, use Investor's Legal Name)	Email Address (jane.doe@seedinvest.com)
<input type="checkbox"/> This person already has a SeedInvest login. <input type="checkbox"/> This person already has the investor account described created on their SeedInvest login.	Relationship (Self, Father, Son, Spouse)

III. MORE TRANSFER DETAILS	
Please explain why you need your holdings transferred. This reason could be death of the current holder, gift to a family member, or transferring to an LLC or Trust. If death is the reason, please include a death certificate with your request.	<input type="checkbox"/> Was any form of compensation, such as currency, received for this transfer?
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IV. LIST HOLDINGS TO BE TRANSFERRED (PLEASE REFERENCE YOUR INVESTMENT CONFIRMATIONS)						
Investment ID (123456)	Company Name (LLC, Inc.)	Security Type (Preferred Equity, Crowd Note)	Security Description (Seed, Series A, B, C, D)	Amount Invested (US \$1,000.00)	Number of Shares (If applicable)	Number of Shares To Be Transferred (If applicable)