



**MEMBERSHIP / CLIENT  
TRANSFER OF HOLDINGS FORM**

**NAME:** \_\_\_\_\_  
(LAST NAME) (FIRST NAME) (M.I.)

**AGE:** \_\_\_\_\_ **D.O.B:** \_\_\_\_\_ **S.S.N:** \_\_\_\_\_

**PREFERRED PRIMARY PHONE NUMBER:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
(STREET) (CITY) (STATE) (ZIP CODE)

**OCCUPATION:**  Incorporated Entity **INVESTMENT TIER(s):**  
 Employed (Please Specify Occupation)  S.P  J.P  Assoc.  
 Self-Employed  Unemployed  Retired  Student  Other \_\_\_\_\_

*By signing below, I acknowledge this document as a non-legally binding agreement between all parties represented herein and that such agreement shall serve only as written guidance from the Grantor/Member listed above to the Templar Investment Group, LLC on how holdings should be managed in the event the requested conditions for transfer are met. Additionally, I understand that the listed beneficiary must be of lawful age and legally accountable at time of receipt.*

X \_\_\_\_\_  
(CLIENT / MEMBER SIGNATURE) (DATE) (MM/DD/YYYY)

**Beneficiary Information**

**Member/Grantor Requested Conditions for Transfer:** **NAME:** \_\_\_\_\_  
(LAST NAME) (FIRST NAME) (M.I.)

Immediate Transfer **AGE:** \_\_\_\_\_ **D.O.B:** - - **S.S.N:** \_\_\_\_\_

Upon Member/Grantor Death **PREFERRED PRIMARY PHONE NUMBER:** \_\_\_\_\_

Member/Grantor Incapacitated **E-mail Address:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
(STREET) (CITY) (STATE) (ZIP CODE)

*By signing this agreement, I swear and affirm that all information provided above is my own or that over whom I have the authority of legal representation. My signature also confirms my receipt, reading, and agreement to abide by the terms as outlined in the member/client governing documents.*

X \_\_\_\_\_  
(BENEFICIARY SIGNATURE) (DATE OF RECEIPT) (MM/DD/YYYY)

**DO NOT WRITE BELOW THIS LINE**

**Beneficiary Located?** **Beneficiary Identity Confirmed?** **Transfer Completed?**

X \_\_\_\_\_  
(SIGNATURE OF AUTHORIZED REPRESENTATIVE) (DATE OF TRANSFER) (MM/DD/YYYY)

The Templar Investment Group, LLC  
1596 Olympian Way Atlanta, Georgia 30310  
follow us @TTIGLLC on Twitter.com!