

# How to Complete Transfers

## Part I: ALLOCATION

In order to complete an allocation transfer, click on the “Allocation” tab at the top blue banner and select “Transfer Allocation” from the drop-down menu. Then, follow the steps described on the next page to complete the transfer.

**Transfer Allocation**

**1** Step 1 - Select the type of allocation transfer...

From my shareholder account to another shareholder's vessel account

**2** Step 2 - Select a vessel account or shareholder account in the table below. When selected, the account will be highlighted in blue...

In the Search box below, type the first few characters of the UserID or Shareholder Name to filter the list

When transferring allocation to another shareholder's vessel account, use the vessel's Coast Guard documentation or state registration number in the search box. Many vessels have similar names and this will ensure the correct vessel receives the allocation. All allocation transfers are final upon submission.

Search:

To Shareholder's Vessel Account	Vessel	Shareholder's Account	Shareholder Name
EXAM1234	EXAMPLE 123456	JODO1234	JOHN DOE
EXAM2025	EXAMPLE FL1234	JASM1234	JANE SMITH

**3** Step 3 - Enter allocation transferred and price paid per pound (if applicable) for each share category ...

Share Category	Current Allocation	Reserved Allocation	Eligible Allocation	Transfer Pounds (gutted weight)	Transfer Price per pound
DWG	100	0	100	<input type="text" value="100"/>	<input type="text" value="5.00"/>
RED GR				<input type="text"/>	<input type="text"/>
GAG				<input type="text"/>	<input type="text"/>
OTHER SWG				<input type="text"/>	<input type="text"/>
TILE				<input type="text"/>	<input type="text"/>
RED GR MULTI				<input type="text"/>	<input type="text"/>
GAG MULTI				<input type="text"/>	<input type="text"/>
RED SNAPPER				<input type="text"/>	<input type="text"/>

**4** Step 3a - Select reason for allocation transfer...

Select reason for transfer

**5** Step 4 - Click the Confirm button to complete the transfer or click the Reset button to clear all selections...

By clicking "Confirm" I certify under penalty of perjury that the foregoing is true and correct.

1. Select the type of allocation transfer you wish to make from the drop-down menu. The options are:  
 From my shareholder account to my vessel account (within account)  
 From my vessel account to my shareholder account (within account)  
 From my shareholder account to another shareholder's account  
 From my shareholder account to another shareholder's vessel account

**NOTE:** All allocation transfers must be completed from a shareholder account (i.e. if the allocation you wish to transfer is located in your vessel account, you must first transfer that allocation to your shareholder account). Also, “within account” transfers do not require a price or reason for transfer (Steps 3 & 4).

2. Select the vessel account or shareholder account in the table so that it becomes highlighted in dark gray.

**NOTE:** When using the search bar to find a vessel to transfer allocation to, enter the Coast Guard documentation or state registration number to avoid an accidental transfer to a vessel with a similar name. All allocation transfers are final upon submission.

3. Enter the allocation transferred and price per pound paid (if applicable) for each share category in the blank text boxes in the two far right columns of the table. Price per pound entered must be at least \$0.01 and no more than \$20.00.

4. Select the reason for transfer from the drop-down menu. The options are:  
 Sale to Another Shareholder  
 Transfer to Related Account  
 Bartered Trade for Shares  
 Bartered Trade for Allocation  
 Package Deal (e.g., purchased vessel with shares)  
 Gift  
 No Comment

5. Click the “Confirm” button if all the information entered looks correct or click the “Reset” button to clear all selections.

6. The “Review Transfer Allocation” page will appear. Once again, review that the information you have entered is correct and that you have selected the correct vessel or shareholder account before you click the “Submit” button. All allocation transfers are final upon submission.

7. The “Transfer Allocation Confirmation” page will appear and you will be provided an eleven-digit allocation transfer confirmation code in the following format: AT-MM/DD/YY-XXX.