

Title: Computershare Info...again...

Author: disoriented_llama

Created 2021-09-18 00:46:36 UTC

Permalink: /r/TheGloryHodl/comments/pqcii8/computershare_infoagain/

Url: /r/Superstonk/comments/plyne9/turning_skeptics_into_believers_computershare/

Linked Post Content:

First and foremost, I'm not here to promote Computershare nor am I telling anyone to transfer or purchase from them. Do your own research and come to your own conclusion in order to make your own sound financial decisions. There are pros and cons tied to this transfer agent but I'm not here to talk about that.

I wanted to share my experience transferring assets from Fidelity up to the point of receiving my certificate from Computershare. I will post all documentation to help validate my process in chronological order so you can see exactly how my assets were transferred from one account to another and eventually, certificated. But first, I'd like to take a moment to thank some individuals.

I want to thank the ape that initiated a conversation that led us both to this option. You are a legend u/Red_Spud and I look forward to the future conversations we might have and what they may help us uncover!

Shoutout to u/GMEJesus for consistently searching for factual information on this topic and inspiring me to shed light on this subject. You are constantly seeking for the truth and spreading valuable knowledge. Your efforts do not go unnoticed.

For those of you out there looking to do a little digging in order to grasp a better concept of Computershare, I highly recommend checking out the content posted by u/pinkpinkcatsonacid and u/MommaP123. Pink has posted some very thorough DD about Computershare and even owns a certificate. Momma has posted some very thorough DD as well. International apes might want to look her way for some insight into the transfer process. Thank you both for all of your contributions!

More importantly, I'd like to thank those that I've encountered along the way that have claimed my certificate is fake. Thank you for lighting a fire under my ass to prove its authenticity. I couldn't have done it without you all.

Moving along...

On August 13th, I called Fidelity through the 1-800 number provided on the application. Initially, there's a verification process. Once you pass this screening, you speak with an agent to assist you. When I initially spoke with the agent and told them I wanted to transfer shares, they told me that Computershare had to initiate it. I knew this was incorrect and quickly responded saying that was not the proper process. The broker must initiate it. I was put on hold for a bit and forwarded to another agent...

The next person I talked to asks what I'm requesting and I tell them I want a DRS form to transfer 40 shares to the transfer agent, Computershare. They put me on hold for a bit again...

The same agent picks up and asks why I'm requesting the transfer. I told them that I didn't have faith in the current market and I felt more secure holding my assets in my name. The agent paused briefly and continued the conversation by clarifying the amount of shares I'd like transferred. Once I stated my request, I was put on hold for a bit again and forwarded to another agent...

The third agent I spoke to asked me to confirm my request. Once I did that, they completed the transfer process. This agent did mention that there was a \$100 fee for the transfer but I've never been debited for it.

After the call, it was just a waiting game for the transfer to initiate...

[I noticed this notification on my app August 16th. No shares had been debited from my brokerage account at this point in time.](<https://preview.redd.it/tc72chuwjpm71.png?width=1620&format=png&auto=webp&s=eae1650f9c16dde692c017a4a038a78cf114e355>)

[August 17th, I received this notification on my app that my account had been debited.](<https://preview.redd.it/03avd8uwjpm71.png?width=1620&format=png&auto=webp&s=ba662f1f6ccd0d3ca4af744070594d392242794c>)

[I logged in to the Fidelity desktop site to see if the transactions reflected there as well.](<https://preview.redd.it/gajlim0fvpm71.png?width=1620&format=png&auto=webp&s=cabfb0c952d413fb7fc686420526625c40358671>)

[Those transactions seem to match up quite nicely!](<https://preview.redd.it/xjwamn0fvpm71.jpg?width=1620&format=pjpg&auto=webp&s=b43340e767ad83dcbda82e78471bfd31eecf3964>)

As soon as I saw that my shares had been transferred on the 17th, I immediately went to the Computershare investor center and registered to create an account. I entered all of the necessary information and was able to fully access my account that day. Technically, they mail you a verification code to finish setting up your account but there's an option to bypass it online.

[I received this document about 5 business days after having created a Computershare account.](<https://preview.redd.it/bjcfztdrwpm71.jpg?width=1620&format=pjpg&auto=webp&s=9f91e17b63f5d1432692dcbc b93f483597986f9b>)

[I had all of my shares certificated the evening of the 17th.](<https://preview.redd.it/jy9gnxixpm71.jpg?width=1620&format=pjpg&auto=webp&s=20f3734cd5b40bef87df5d64533a702c730fd3b9>)

[Here's the email confirmation I received about my certificate being issued.](<https://preview.redd.it/4dfulzicxpm71.jpg?width=1620&format=pjpg&auto=webp&s=f64226316570d1a541de8d803d3bd7d07b158aa9>)

[Here's the emailed receipt from the completed certificate transaction.](<https://preview.redd.it/hedtp9jcxpm71.jpg?width=1620&format=pjpg&auto=webp&s=880e83c8cb0bba67d28c05355b58c75ba742d55d>)

[This is the current balance of my portfolio. Notice that I have 0 "book" shares which is most likely the reason why there's no longer an option to "certificate" under the "actions" tab.](<https://preview.redd.it/au6dix2hympm71.jpg?width=1620&format=pjpg&auto=webp&s=1657b143c1547b7b8d997cbf877e82fdc3dd0c60>)

[Notice that the \"actions\" tab next to my \"certificated\" shares have the option to replace certificates. That's interesting.](<https://preview.redd.it/f9fzkt2hypm71.jpg?width=1620&format=pjpg&auto=webp&s=636bab575d10479d6f907f8f599e978aa777f280>)

[If I click on \"account details\" in the \"actions\" tab next to my shares, this page will open which displays a current summary of my holdings.](<https://preview.redd.it/ozis0x2hypm71.jpg?width=1620&format=pjpg&auto=webp&s=69e12370ac3fbd8184b59ecf3aec44f60023b8b>)

[This is where I'm taken if I click on \"certificate details\" from the previous page.](<https://preview.redd.it/dv3na03hypm71.jpg?width=1620&format=pjpg&auto=webp&s=d00540ee6e75241d7ff98934c954da6cc87651a6>)

[If I click on the menu tab in the top right hand corner of the page, it will give me the option to look at account activity. If I click on \"activity\" and then \"transactions\" it displays my credited shares from Fidelity and also the conversion of those shares into a certificate by Computershare.](<https://preview.redd.it/hzbyav2hypm71.jpg?width=1620&format=pjpg&auto=webp&s=e973d5320ecfab8e404daaf3b6c181832c1bbd58>)

[I received this letter about 5 business days after having requested to certificate my shares online.](<https://preview.redd.it/gc3n303hypm71.jpg?width=1620&format=pjpg&auto=webp&s=c8a426bbcf2644fe69503eb4d45321ccfd7abba>)

[In the \"account details\" page, if I click on \"check transfer status\" and then view it, I'm redirected to a desktop portfolio.](<https://preview.redd.it/gropjk44zpm71.jpg?width=1620&format=pjpg&auto=webp&s=74edf95a9f475f3e67f21a906dad67c1fe69c9f9>)

[This reflects precisely what I see through the other portal.](<https://preview.redd.it/wfx1mf44zpm71.jpg?width=1620&format=pjpg&auto=webp&s=2f33fb6f8adf433e2bab70b2a8d5e40a1e564e32>)

[Here's another reflection of what the other portal displays.](<https://preview.redd.it/q1gqeg44zpm71.jpg?width=1620&format=pjpg&auto=webp&s=1d981917fcd1ba2379d316effd03a70727999709>)

[This was a chat transcript from the 19th that I had emailed to myself for record keeping. I had a question about the potential sale of certificated shares. I was interested in what that process looked like. Apparently, there are a couple methods of approach. Not that it matters.](<https://preview.redd.it/m4miig1azpm71.jpg?width=1620&format=pjpg&auto=webp&s=c6fd113127b0ab3f4ce5f12f6ae5d086b35429a9>)

[This is the remainder of the transcript I had emailed to myself.](<https://preview.redd.it/hpe1ig1azpm71.jpg?width=1620&format=pjpg&auto=webp&s=5bec16d52cd59d542235915f6564ea56232b6b2a>)

[I didn't hear anything from Computershare regarding my certificate which I actually expected. They didn't contact me to register an account once my shares transferred so I didn't expect to hear anything about this. After having completed that entire process I knew patiently waiting would pay off. Finally, on August 24th, this piece of art arrived!](<https://preview.redd.it/sbtixi1azpm71.jpg?width=1620&format=jpg&auto=webp&s=9baa93cd04c3ad57face027567fd728726d39675>)

TL;DR: Requesting certificates is possible through Computershare. If you're skeptical, do some DD.