

Letter of Authority giving servicing rights to a regulated third party



Please complete in BLOCK CAPITALS using BLACK INK. **PLEASE NOTE:** Any applications received that are not completed correctly may incur delays or may have to be returned to you.

1 Client Details

Please complete your details below:

TITLE	SURNAME
<input type="text"/>	<input type="text"/>

CLIENT NAME
<input type="text"/>

ADDRESS ("Care of" and PO Box are not acceptable. Only UK mainland and Northern Ireland addresses are eligible)
HOUSE NUMBER AND/OR HOUSE NAME

CLIENT ACCOUNT NUMBER/S
<input type="text"/>
<input type="text"/>

STREET, CITY, COUNTY AND COUNTRY DETAILS

POSTCODE	DATE MOVED TO THE ABOVE ADDRESS
<input type="text"/>	<input type="text"/>

2 Authority to transfer servicing rights

I/We hereby authorise Fidelity to transfer the servicing of above investments to the following IFA person(s):

NAME OR COMPANY NAME
<input type="text"/>
ADDRESS INC STREET, CITY, COUNTY AND COUNTRY DETAILS
<input type="text"/>

FCA NUMBER (if known)
<input type="text"/>

POSTCODE	UNIQUE ADVISER NUMBER (if known)
<input type="text"/>	<input type="text"/>

They have agreed to provide services to me, to be funded by future renewal commissions. Please also provide copies of future correspondence and any information they require regarding my existing account(s).

3 Declaration and Signature

The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
SIGNATURE(S) OF ALL APPLICANTS AND DATE (YOU MUST SIGN HERE - Please ensure all relevant sections are completed as per the instructions on this form)
If you are signing the application form by Power of Attorney, please call Fidelity for the details of documentation that is required for this to be acceptable.

You must provide a SIGNATURE for EACH ACCOUNT HOLDER

PRIMARY ACCOUNT SIGNATURE	✘	<input type="text"/>	✘
SECOND ACCOUNT SIGNATURE	✘	<input type="text"/>	✘
THIRD ACCOUNT SIGNATURE	✘	<input type="text"/>	✘
FOURTH ACCOUNT SIGNATURE	✘	<input type="text"/>	✘

Please send your completed form to Fidelity International (IMS), PO Box 80, Tonbridge, TN11 9YA.
Issued jointly by Financial Administration Services Limited and FIL Investment Services (UK) Limited, which are both authorised and regulated by the Financial Conduct Authority.

