SEYMOUR SINCLAIR INVESTMENTS ISA / FUNDS RE-REGISTRATION / TRANSFER APPLICATION APPOINTMEMENT OF AGENCY

Use this form to ~ Consolidate your investments ~ Transfer your ISA & investment funds by Re-registering onto FundsNetwork ~ Create just one investment account ~ Appoint us as your Agent

1 PERSONAL DETAILS - Complete In full	Address							
Mr/Mrs/Ms/Miss/Other Male Female								
Surname								
Forenames	Postcode							
Date of Birth								
NI Number	Employment status							
Email	I am a UK citizen and subject to UK tax rules							
Telephone	Country of Birth							
Occupation	Nationality							
2 JOINT HOLDER DETAILS - Complete In full - This section should only be completed for Non-ISA joint holding investments								
Mr/Mrs/Ms/Miss/Other Male Female	Address (if different) from above)							
Surname								
Forenames								
Date of Birth	Postcode							
NI Number	I am a UK citizen and subject to UK tax rules							
Email	Country of Birth							
Occupation	Nationality							
DESIGNATIONS - Non ISA Only - Complete this section if your existing holding has a designation or if you wish to assign the investment to another beneficial owner, such as a child. Maximum of eight alphanumeric characters.								
4 INCOME								
Consolidated monthly income - Income generated from your investments will be consolidated and paid into your bank monthly.								
Cash Management Account - Income generated will be held in your Cash Management Account for withdrawals or future investments.								
Retain in the fund - Income generated from your investments will be retained in the fund.								
NOMINATED BANK ACCOUNT - This section is required for income payments and also for redemptions								
Bank or Building Society name and address	Name of account holder							
	Branch Sort Code							
	Account Number							
	Building Society Roll Number							
Postcode								

6 EXISTING P (If applicable)	LATFORM					A	A/C No				
7 DETAILS OF EXISTING INVESTMENTS & PLATFORM											
ISA Current 1	Гах Year	Previous Ta	ax Year(s)		Non IS	SA			undsNetwork wing ISAs see the		
Company / Platform		Fund Name		Р	lan or A	ccount Nu	ımber	Unit Type Inc or Acc	Approx Value £	ISA or Non-ISA	
8 CASH ISA TR	RANSFER Name	e of Cash ISA I	Provider								
All my Cash ISA or	this amount of my Ca	sh ISA £			Numbe	er of days	notice	before tran	sfer can pro	oceed	
Building Society / Bank So	rt Code		Account Number								
9 FUNDS YOU WISH TO INVEST INTO											
Keep Same Funds	YES	NO _	- complete section be	elow	,		Inc	ome Paid	Out YES	NO	
Company / Platform		Fund Name		F	Plan or Ad	count Nu	mber	Unit Type Inc or Acc	Approx Value £ or %	Single or Joint A/C	
10 PORTFOLIOS -	If you want to transfer	into one of ou	ır Ready-Made Portfoli	os ~	Tick ch	noice	In	vestment %	6 Inc	or Acc	
Portfolio Choice - Month	ıly Income Capita	al Growth	Index Tracking	Inve	stment ⁻	Trust					
I confirm that: I have not re and Conditions of my chos my investment choices. I chappen. I am aged over 1 systems and companies in statement. I understand at fees, units may be sold. I depart of the systems and companies in statement. I was a fees, units may be sold. I depart of the systems and companies in statement. I was a fees, units may be sold. I depart of the systems are systems and companies in statement. I was a feet of the systems are systems and companies in the systems are systems.	ON your investment ad eceived investment ad en Platform and by sig understand that a re-re 8. I am a UK citizen a including Fidelity Funds and agree to Seymour declare that the informatics.	ts to Seymou vice from Seyi ning this form, egistration / IS, and subject to Network. Infor Sinclair Invest ation contained	mour Sinclair Investme I agree to be bound be A transfer can take up UK Tax rules. I confirmation on how Funds I ments Terms and cor I in this application forr	advients by the to form the Networdition is	for this em. I had our weed nat my to work proof one and correct to	d Platfor transaction we read to ks to contheir person cesses poto the feator the best	rms. on. I ha he rele mplete conal da ersona es pay st of my	ave read an vant product and that de ata will be led that may able and the knowledge	d understar t key featur lays and re processed b be found in at in order	nd the Terms es relating to jections may by third party their privacy to pay these	
First Applicant Signature		Second A	oplicant Signature				ate				