

1. Personal details

Client reference number ¹

Title

First name

Middle name(s)

Surname

Date of birth

D

D

/

M

M

/

Y

Y

Y

Y

Before deciding how to invest, you need to choose the appropriate account(s) to hold your investments in. Each account type has different tax benefits and implications.

You may hold only one SIPP or ISA, but as many Investment Accounts as you need.

¹ Your client reference number can be found on your Investment Report or in the drop down menu in the top right hand corner of your online portal account.

2. Account details

Income from your investments

Some investments generate income in the form of dividends, distributions or interest. You need to specify how you would like this income to be treated.

What would you like us to do with this income?☐ Keep in my capital account ☐ Pay away to my nominated bank account

3. Important information

This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information.

TrinityBridge has given no advice as to the suitability of this product for your needs. By reading and accepting the information and declaration below you confirm acceptance that you are solely responsible for your investment decisions, and for the suitability of the product you have selected.

This service is provided, and will be carried out, in line with our Terms and Conditions. The Terms and Conditions, charges and other relevant information are available at all times in the Literature Library. For your own benefit and protection, please ensure you read and agree to them. If there is anything you do not understand please call us to request clarification.

4. Declarations

I declare that the information in this application is correct to the best of my knowledge and belief. I have read and agreed to any Declaration, Terms & Conditions and Key Features and Charges Schedules made available to me and agree to be bound by their terms and conditions. These documents can also be found on the website at any time.

Signature

Print name (BLOCK CAPITALS)

Date

D

D

/

M

M

/

Y

Y

Y

Y

To return this form, please scan and email it from your
registered email address to:

directinvestment@trinitybridge.com

Or you can post it using our FREEPOST address:

'freepost TRINITYBRIDGE INVESTOR SUPPORT'

Or, if signing electronically via DocuSign then click 'Finish' to submit

Our Terms and Conditions are available online, please visit:

trinitybridge.com/general-terms-and-conditions

Call us with any questions on:

0800 33 99 99 8am - 6pm, Mon - Fri excl. UK bank holidays