

# Top-up form

## Top-up form

This form is to be used to top up an existing fund account or an existing current tax year ISA. To open a new fund account, a new ISA or to invest in an ISA in a new tax year, please use the appropriate full application form. Before you sign this form, please make sure you have read an up-to-date version of the Key Investor Information Document (KIID) and Sustainability Disclosure for each fund into which you wish to invest. You should also read the Supplementary Information Document, Terms and Conditions and Prospectus. These important documents are available from our website [www.edentreeim.com/fund-literature](http://www.edentreeim.com/fund-literature)

Please complete all sections and return to:

**EdenTree Investment Management Limited, Sunderland SR43 4AU**

### Personal details – Applicant One

Title (Mr/Mrs/Miss/Ms/Dr/Revd/Other)

Surname

Forename(s)

Company name

Existing account number

Account designation (if applicable)

Has your permanent residential address or tax residency changed since your original application? (If Yes, please provide full details)

Yes

No

### Personal details – Applicant Two (if applicable)

Title (Mr/Mrs/Miss/Ms/Dr/Revd/Other)

Surname

Forename(s)

Company name

### Investment split

Please tell us how you would like your investment split

Minimum investment  
£50 per fund per month

Fund		Lump Sum
EdenTree Sustainable European Equity Fund	£	
EdenTree Sustainable Global Equity Fund	£	
EdenTree Sustainable Sterling Bond Fund	£	
EdenTree Sustainable UK Equity Fund	£	
EdenTree Sustainable Managed Income Fund	£	
EdenTree Sustainable UK Equity Opportunities Fund	£	
<b>Total investment</b>	<b>£</b>	

## Declaration

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I confirm that I have read and understood the EdenTree Investment Management Supplementary Information Document, the Sustainability Disclosure(s), the Key Investor Information Document(s) for the fund(s) and share class(es) in which I am investing and if subscribing to an ISA, the latest ISA Terms and Conditions.

I/we have read and understood the Prospectus, and consent to the ACD applying the Delivery Versus Payment Exemption (as set out in the Prospectus) which means that FCA client money rules do not apply to subscription monies received to settle transactions for the first day following receipt.

Signature

Date

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Signature

Date

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## Investment advice and adviser/agent details

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Please use the tick boxes provided to indicate whether you have received advice from a financial adviser on this investment and provide their details.

**I have received advice from the following adviser**

Company Name

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Address

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Postcode

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**I have not received advice from a financial adviser**

## To be completed by your financial adviser/agent

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FCA Code

Contact Name

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Telephone

Email

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Please remember to include an Identity Verification Certificate (IVC)

**By submitting this application you are agreeing to the Edentree Terms of Business for Intermediaries. This can be downloaded from our website.**

**For help completing the form or for further information on any of our products, call us on**

**0800 358 3010**

Monday to Friday 9am to 5pm.

We may monitor or record calls to improve our service.

**You can email us at**

**[investmentadmin@edentreeim.com](mailto:investmentadmin@edentreeim.com)**

**Or visit us at**

**[edentreeim.com](https://edentreeim.com)**

**Support for financial advisers**

**Dealing and administration**

**0800 358 3010**

**Sales support**

**0800 011 3821**

**Or visit us at**

**[edentreeim.com/literature](https://edentreeim.com/literature)**



EdenTree Investment Management Limited (EdenTree)  
Reg. No. 2519319. Registered in England at Benefact House,  
2000, Pioneer Avenue, Gloucester Business Park,  
Brockworth, Gloucester, GL3 4AW, United Kingdom.  
EdenTree is authorised and regulated by the Financial Conduct  
Authority and is a member of the Investment Association.  
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