

Regular Savings Plan Amendment form



Regular Savings Plan Amendment form

This form is to be used to amend an existing Regular Savings Plan. 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 and Prospectus. These important documents are available from our website www.edentreeim.com/fund-literature. To begin a new Regular Savings Plan please use the appropriate full application form.

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

Regular Savings Plan instruction

From the next amendable collection date, please register my Regular Savings Plan to collect and invest as outlined below:

Please tell us how you would like your investment split

Fund		Minimum investment £50 per fund per month
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	£	
Total investment	£	

Declaration

I confirm that I have read and understood the EdenTree Investment Management Supplementary Information Document, the Key Investor Information Document(s) and Sustainability Disclosure(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/ ISA Terms & Conditions (if applicable), 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

Signature

Date

Investment advice and adviser/agent details

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

Address

Postcode

I have not received advice from a financial adviser

To be completed by your financial adviser/agent

FCA Code

Contact Name

Telephone

Email

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

Or visit us at

edentreeim.com

Support for financial advisers

Dealing and administration

0800 358 3010

Sales support

0800 011 3821

Or visit us at

edentreeim.com/literature



EdenTree Investment Management Limited (EdenTree)
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Brockworth, Gloucester, GL3 4AW, United Kingdom.
EdenTree is authorised and regulated by the Financial Conduct
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