

Switch form

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This form is to be used to switch an existing fund holding(s) from one EdenTree Investment Management fund to another, within the same account. 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 switch. To open a new fund account, to invest in a new ISA or to top up an existing account, please use the appropriate 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

Switch instruction

Please tell us how you would like your existing investment switched

Existing fund

Amount (£, shares or %)

New fund

Declaration

I confirm that I have read and understood the EdenTree Investment Management Supplementary Information Document, the Key Investor Information Document(s) and the 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.

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

Discount (if applicable)

For Execution Only Advice or other eligible entities post RDR

Commission terms (if applicable)

If commission is to be paid, please tick this box to confirm this investment is eligible

Please remember to include an Identity Verification Certificate (IVC)

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



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EdenTree is authorised and regulated by the Financial Conduct
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