wealthtime classic

General Investment Account Application Form

Thank you for your interest in the Wealthtime Classic General Investment Account (GIA). Before you fill out this form, please make sure you've read and understood our GIA Key Features Document.
Once you've decided it's the right product for you, please complete all sections.

If you are sending this form by post, please complete in CAPITAL LETTERS using black ink and return to:
Wealthtime Classic, PO Box 2468, SALISBURY, SP2 2UH.

Personal details

Applicant one

First name(s) in full	
Last name	
Date of birth (dd/mm/yyyy)	
Client number (if known)	

Applicant two (optional)

First name(s) in full	
Last name	
Date of birth (dd/mm/yyyy)	
Client number (if known)	

GIA payment

To make a payment into your GIA please indicate the amount.

Single deposit (£) ☐

Please tick as appropriate. I wish to pay for my deposit:

From my Wealthtime Classic ISA account cash balance. ☐

By bank transfer to Wealthtime. ☐

Regular payments (£) ☐

Frequency of regular payments:

Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly ☐

Start date for regular payments: (dd/mm/yyyy) 1 2 / __ / 2 0 2 _

or 2 7 / __ / 2 0 2 _

If you want to make regular payments to your GIA, please forward a completed Direct Debit mandate to us – a copy is available in the literature library at wealthtime.com. Please allow 15 working days for us to set this up.

GIA(s) to be transferred

Total number of GIAs to be transferred ☐

Please complete a GIA transfer authority form for each existing GIA you wish to transfer.

Declaration

This declaration forms part of your GIA application and together with the Wealthtime Classic Terms and Conditions will constitute a legally binding contract between you and Wealthtime Classic. Please note that Wealthtime Classic means Wealthtime Limited or Wealthtime Trustees Limited where appropriate, unless a specific company name is mentioned.

I/We acknowledge and accept the GIA Key Features and Wealthtime Classic Terms and Conditions.

I/We understand that the services provided don't constitute financial advice under the terms of the Financial Services and Markets Act 2000.

I/We also accept the fees detailed in the Wealthtime Classic Fees Schedule.

Your signature (applicant one)		Your signature (applicant two)	
Full name		Full name	
Date (dd/mm/yyyy)		Date (dd/mm/yyyy)	

This section must be completed by your Adviser

I have given advice to my client about their Wealthtime Classic Product(s). I have provided them with copies of the Key Features Document, key features illustration, key investor information document, as are relevant to this transaction.

Your signature		Position	
Name		Date	

Details of introducing firm (or sole trader)

Full name of regulated firm (or sole trader)		FCA reference number	

If you require this document in an alternative format please contact us.

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General Investment Account Transfer Authority Form

Complete this form to transfer an existing General Investment Account (GIA) into a Wealthtime Classic GIA.

Personal details

Applicant one

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

If 'other' please state

First name(s) in full

Last name

Date of birth (dd/mm/yyyy)

National Insurance number

Applicant two (optional)

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

If 'other' please state

First name(s) in full

Last name

Date of birth (dd/mm/yyyy)

National Insurance number

Permanent residential address

Postcode

Account to be transferred

Name of GIA

General Investment Account number(s)

Name of transferring General Investment Account provider

Address of transferring General Investment Account provider

Postcode

Is the plan subject to any existing or proposed trustee in bankruptcy or other receiving orders?

Yes ☐ No ☐

Transfer details

Please transfer the cash balance to Wealthtime Classic by bank transfer. ☐

Or please indicate as appropriate. I'd like you to:

Sell the assets held in my existing GIA and transfer the cash proceeds to my Wealthtime Classic GIA ☐

or

Arrange for the re-registration of assets held in my existing GIA to my Wealthtime Classic GIA.* ☐

*Any re-registration of investments into your Wealthtime Classic GIA will be subject to your existing GIA manager allowing this type of transfer and your investments being available on the Wealthtime Classic Funds List.

If it's not possible to re-register my existing GIA investments, please arrange for these to be sold and transferred in cash: Yes ☐ No ☐

Please indicate the approximate fund value to be transferred as a percentage (%) or an amount (£):

Is this a full or a partial transfer?

Full ☐ Partial ☐

If you wish to transfer a portion of your GIA, and not the whole amount, please indicate the value to be transferred as a percentage or amount (£):

Transfer authorisation

I authorise, instruct and apply to the current provider detailed above to transfer sums and assets from the plans detailed above directly to Wealthtime Classic and to provide any instructions and/or discharge required by any relevant party.

I accept that in order to comply with regulatory obligations Wealthtime Classic and the current provider named in this application may need to verify my identity and residential address and may use credit reference agency searches and ask for my documents to verify my identity and address.

Until this application is accepted and complete, Wealthtime Classic's responsibility is limited to the return of the total payments to the current provider.

Your signature (applicant one)		Your signature (applicant two)	
Full name		Full name	
Date (dd/mm/yyyy)		Date (dd/mm/yyyy)	

If you require this document in an alternative format please contact us.