

General Investment Account Application Form

Thank you for your interest in the Wealthtime Select 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.

Personal details

Applicant one

First name(s) in full

Last name

Date of birth
(dd/mm/yyyy)

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Client number
(if known)

Applicant two (optional)

First name(s) in full

Last name

Date of birth
(dd/mm/yyyy)

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Client number
(if known)

GIA payment

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

Single
deposit (£)

Regular
payments (£)

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

From my Wealthtime Select ISA account
cash balance.

☐

Frequency of regular payments:

☐ Monthly
 ☐ Quarterly
 ☐ Half-yearly
 ☐ Yearly
 ☐

By bank transfer to Wealthtime.

☐

Start date for
regular payments:
(dd/mm/yyyy)

1	2								
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or

2	7								
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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 Select terms and conditions will constitute a legally binding contract between you and Wealthtime Select. Please note that Wealthtime Select 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 Select 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 Select fees schedule.

Your signature
(applicant one)

Full name

Date (dd/mm/yyyy)

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Your signature
(applicant two)

Full name

Date (dd/mm/yyyy)

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This section must be completed by your financial adviser

I have given advice to my client about their Wealthtime Select 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

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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.

Wealthtime and Wealthtime Select are trading names of Wealthtime Limited. Wealthtime Limited is a limited company registered in England and Wales. No. 06016480. Registered Office: 1 London Road Office Park, London Road, Salisbury SP1 3HP. Wealthtime Limited is authorised and regulated by the Financial Conduct Authority. FCA Number 468461.

General Investment Account Transfer Authority Form

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

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National
Insurance
number

Permanent
residential address

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)

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National
Insurance
number

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

Transfer details

Please transfer the cash balance to Wealthtime Select by bank transfer.

☐

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

☐

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 Select GIA

☐

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 (£):

or

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

☐

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

Transfer authorisation

Please transfer the above GIA to my/our Wealthtime Select GIA. I/We also request and consent to the transfer set out in this application form. By signing this declaration, I/We authorise you to release details about the transfer from my/our current GIA to Wealthtime Select.

Your signature
(applicant one)

Your signature
(applicant two)

Full name

Full name

Date
(dd/mm/yyyy)

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Date (dd/mm/yyyy)

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