



Regular Investment Instruction

We're currently rebranding from Novia to Wealthtime. You'll notice that some of our products and services still use the name Novia while we're transitioning over to the new name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

Please complete this instruction if you wish to set up or amend an existing Regular Investment instruction linked to a Direct Debit. This form should not be used for setting up or amending a standalone recurring switch – the recurring switch instruction form should be used for this purpose. Please note that if the investor currently has a Regular Investment in their default selection, this will now be amended to reflect their new default. Wealthtime will accept the receipt of this form without a signature, provided it is submitted through the Adviser Zone secure email service. If you choose to sign the completed form, please arrange for the original to be returned to Wealthtime.

If you need assistance completing this form, please contact the client services team on 0345 680 8000.

Investor Details

Investor number:

Investor name(s):

Regular Investment Instruction

Please apply this instruction to (eg GIA): Number:

And the collection of: £ commencing with effect from*
(dd/mm/yyyy)

*This instruction must be received by us five business days before the Direct Debit collection date.
If no commencement date is entered, we will commence this instruction from the next available collection.

Option One Investment Model

Please invest the amount detailed in Section two into the following model (please ensure the full model name is quoted):

Please note, the model needs to be linked to the specific Product Wrapper via MPM.

Option Two Specified Funds

ISDN/Sedol	Name of Investment*	Inc/Acc	%
	Cash (minimum 2%) **		
Total***			100%

*Please write the names in full as listed on our Investments List. The list and fact sheets can be found at www.wealthtime.com

**We receive interest on the Cash held within your account. The amount we receive will vary as interest rates rise and fall. We keep some of this interest and pass the rest on to you. Visit our website for the latest interest rates and for more on what this means for you: wealthtime.com/investors/documents/wealthtime-platform-cash-account

***The total for all the named Investments must be the same as the overall switch amount stated for Option two. Please note that the total must add up to 100%. You must invest a minimum of 2% cash.

Adviser Declaration

(This section must be completed regardless of submission method)

Wealthtime will accept receipt of this form without a signature, provided it is submitted through the Adviser Zone secure email service. If you choose to sign the completed form please arrange for the original to be returned to Wealthtime. By submitting this form you are confirming the following:

- I declare that the information in this form is true and correct to the best of my knowledge.
- I agree to indemnify Wealthtime against all such claims or losses, including additional tax charges and fines, in the event that the information provided proves to be incorrect.
- I understand that checks may be performed on this instruction to confirm details are correct.
- I confirm that I have the investor's authority to submit this instruction on their behalf.
- I/We understand, if applicable, this will replace any existing instructions.
- I understand that failure to provide all of the necessary information may lead to delays in setting up this Instruction.

Name:

Position:

Firm name:

Firm FCA number:

Adviser signature:

If you are submitting by post,
you must sign here.

Date (dd/mm/yyyy):

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

Wealthtime is a trading name of Novia Financial plc. Novia Financial plc is a private limited company registered in England and Wales. No. 06467886. Registered office: Cambridge House, Henry St, Bath, BA1 1JS. Novia Financial plc is authorised and regulated by the Financial Conduct Authority. FCA Number 481600.