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Regular Investment Instruction

We've rebranded from Novia to Wealthtime. You'll notice that some of our products and services have kept the Novia 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.

Complete this form to set up or amend an existing Regular Investment instruction linked to a Direct Debit. If the investor currently has a Regular Investment in their default selection, this will be updated to reflect the new instruction.

We'll accept this form without a signature if it's submitted through the Adviser Zone secure email service. Alternatively, please sign the completed form and send the original to us in the post at: **Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR**

Please note this form should not be used for setting up or amending a standalone recurring switch. Please use the **Recurring Switch Instruction form** instead.

Investor Details

Investor number:

Investor name(s):

Regular Investment Instruction

Please apply to Product Wrapper (e.g. GIA):

Product Wrapper 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 above 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.

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Option Two - Specified Funds

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

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Adviser Declaration

(This section must be completed regardless of submission method)

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.