wealthtime classic

Investor Online Registration Form

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

Your details

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐ If 'other', please state

First name(s) in full*
*As per birth certificate

Last name

Date of birth (dd/mm/yyyy)

Investor number (if known)

Memorable information

We need some security information to verify our users. You'll need to remember this information as we'll ask you about it when you first log in. The sections below need to be completed by you or your nominee.

Please use a maximum of 15 characters per answer and avoid the use of punctuation.

Mother's maiden name

Place of birth

Please note: When entering your memorable date, the year should be between 1900 and 2100.

Memorable school

Memorable date (dd/mm/yyyy)

Memorable place

Online registration declaration

Email address

I agree that I am/my nominee is authorised to view the relevant data. I declare that I've read and accepted the Wealthtime Classic Online Service Terms and Conditions and that my online account will be activated.

Your signature

Date (dd/mm/yyyy)

If you're appointing a nominee, please also complete and sign the next section.

Online access for another investor within your Wrap

I authorise you to provide online access to my wrap to the person named below.
This person must also be an investor with Wealthtime Classic and be registered with online access.

Full name of authorised person

Date of birth

wealthtime classic

Online registration – appointment of nominee

When registering online, you may nominate a third party to view your data. If you decide to nominate someone, you must agree to the following statements:

I appoint the nominee below to view my data, receive information online including confidential information, and send secure messages.

I authorise Wealthtime Classic to provide the Wealthtime Classic Online Service to my nominee.

I understand I can withdraw consent for my nominee to view my account at any time by contacting Wealthtime Classic and requesting that nominee access be removed.

Your signature

Date (dd/mm/yyyy)

Remember, this nominee is only in respect of the Wealthtime Classic Online Service access and correspondence will still be addressed to you.

Nominee declaration

I agree that I'm authorised to view the relevant data.

I declare that I've read and accepted the Wealthtime Classic Online Service Terms and Conditions.

I agree that I'll inform the main applicant about any information that requires a decision or action, and will inform Wealthtime Classic of such decisions or actions if appropriate.

Nominee's signature

Date (dd/mm/yyyy)

Name of nominee

Address of nominee

Postcode

Wealthtime Classic online services Terms and Conditions

Below are the Terms and Conditions all Wealthtime Classic online users must agree to before access will be granted. Please read them carefully and make sure you understand all items before signing the online registration declaration.

From time to time we may notify you of any additional Terms and Conditions online.

Security

You're responsible for protecting your login details and other security identification information. To do this, you must take reasonable steps to keep your information secret, not share your login details with anyone, not allow anyone else to use it, never write your information down without disguising it, not leave a PC unattended while logged onto the service, and destroy or securely store any information printed off from the service.

Data protection

Please refer to the data protection clauses included in the Wealthtime Classic Key Features and Terms and Conditions and the Wealthtime Data Privacy Policy available at wealthtime.com.

Revoking access

We reserve the right to revoke any investor's and/or their nominee's online user access at any time, for any reason.

Information available

- The details available under your account are for illustrative purposes only.
- The date when your account information was last updated will be indicated where possible.

Additional users

We'll also grant others (e.g. family members) access to your account should you wish, following completion of the Authority to Provide Information to Third Party form

Additional access to other accounts

If you want to view the wrap or products of others (e.g. family members), please ask the relevant parties to complete the Authority to Provide Information to Third Party form

Please note, in respect of minors, this access will be automatically withdrawn when the minor reaches the age of 18 years. They can then sign the Authority to Provide Information to Third Party form in their own right, allowing you to continue accessing their information.

Availability/alteration of service

Availability of our online services depends on our own system's availability and normal internet availability. We won't accept liability for any consequences of unavailability of the system for any reason.

We may also amend, extend or withdraw any online service at any time.

Access rules

The information relating to your account can be accessed only using your online access number, password and pin number.

The service may have limited update facilities, allowing the user to inform us of changes. If any changes are made to the data, we won't accept responsibility for its accuracy.

Errors and omissions

We endeavour to keep our records up to date at all times. However, there may be changes we may not have been notified of by you or a third party. If you access a record, which you believe contains errors or omissions, please tell us immediately.

We act as a central collection point for investment information. We rely on third parties to get up-to-date information and are dependent on their efficiency and accuracy.

We won't accept liability for any claims by you and/or your appointed representative/nominee/financial adviser for damages or loss arising from an inaccurate record.

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