



Adviser Charges

This form is to be used for the addition, amendment or removal of monetary fee charges, or replacing the current monetary fee with a percentage charge. We will accept the receipt of this form without a signature, **provided it is submitted through the secure email service**. If you choose to sign the completed form please arrange for the original to be returned to **Wealthtime Client Services, PO box 4328, Bath, BA1 0LR**.

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

Product Details

Wealthtime investor number:	<input type="text"/>		
Product wrapper type:	<input type="text"/>	Wrapper number:	<input type="text"/>
Investor name(s):	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		

Change of Adviser Charges

I/We understand this will be paid to my/our adviser from the money I/we have invested.

This instruction will replace any existing instruction for this product wrapper.

Ongoing: % per annum to be paid monthly

or

£ per annum to be paid

Monthly: ☐ Annually: ☐

Please note, that where your product is an Offshore Bond, all adviser charges taken from the Offshore Bond are considered to be withdrawals for the purpose of the 5% tax deferred allowance. Any change must be received by our client services team 10 business days before the date of payment for ongoing charges.

*The maximum ongoing adviser charge is 2% pa of the policy value at the time of taking the charge. If a higher figure is recorded on this application, the maximum will be applied. There is no maximum ongoing adviser charge for the GIA.

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 that the details are correct.
- I confirm that the investor has agreed the new adviser charges and 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 submitting by post,
you must sign here.

Date (dd/mm/yyyy):

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If you need 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: Royal Mead, Railway Place, Bath, BA1 1SR. Novia Financial plc is authorised and regulated by the Financial Conduct Authority. FCA Number 481600.

The Novia Offshore Bond is issued by RL360 Insurance Company Limited ('RL360') (RL360 is authorised by the Isle of Man Financial Services Authority and registered in the Isle of Man. No. 053002C Registered office International House, Cooil Road, Douglas, Isle of Man IM2 2SP) and is marketed and administered by Novia Financial plc, trading as Wealthtime.