



Transfer of Servicing

Complete this form if you want to appoint a new Adviser to look after your Wealthtime account. Completing this form will allow us to change the Adviser that is currently registered on the account to your newly-appointed Adviser so then they can obtain all of the necessary information and have full servicing rights on your Investments.

You can sign this form digitally. If you do sign this form using an electronic signature, you must use the email address that is registered to your Wealthtime account. Once completed, your new Adviser can send it to us via secure email. If you don't have access to our selected electronic signature provider, please sign the declaration on page two using a blue or black pen and scan the form before sending it to us by secure email. Alternatively, you can send the form by post to: **Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR.**

Investor Details

Investor number:

Investor One

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

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Investor Two

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

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New Adviser's Detail

Please be aware that in order for your new Adviser to obtain servicing rights on your accounts, your new Adviser must:

- Have established Terms of Business with Wealthtime.
- Have FCA authorised status.

If you're unsure whether your new adviser has already established Terms of Business with us, please contact them before the form is sent to us.

Company name:

FCA number:

Adviser's name:

Adviser's FCA number:

Adviser Charges

Does the level of Adviser charges remain the same?

☐ Yes ☐ No

If you have ticked No, please specify the details of the Adviser charges

Ongoing: % per annum to be paid monthly

or £ per annum to be paid:

☐ Monthly ☐ Annually

Client Signature

Print name:

Signature: Date (dd/mm/yyyy):

Print name:

Signature: Date (dd/mm/yyyy):

If you sign this form by electronic signature, you confirm that this method of signature is your agreement to be bound as if signed by your manuscript signature.

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

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