

BANKING DETAILS



And/or Direct Debit Instructions

Mandatory fields marked with*

Please complete this form if you want to change your nominated bank details. Completing this form enables you to fund your Wisdom account as needed, but does not oblige you to make regular payments. For joint accounts, please note that **both** account holders must sign the form. Please complete this form in BLOCK CAPITAL letters, sign and return it to Witan Wisdom, PO Box 10550, Chelmsford, CM99 2BA.

Please tell us what you would like to do:

Change the nominated bank details on my Witan Wisdom account **and** set up regular savings with new bank details to fund my Witan Wisdom account

1. Wisdom account details	
Wisdom product*	Witan Wisdom Share Plan <input type="checkbox"/> Witan Wisdom ISA <input type="checkbox"/>
Wisdom account number(s)	<input type="text"/> <input type="text"/>
2. Your details (For joint accounts, the first named account holder)	
Your title*	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other title <input type="text"/>
First name*	<input type="text"/>
Surname*	<input type="text"/>
Your permanent home address*	House number or name* <input type="text"/>
Address details*	<input type="text"/>
Postcode*	<input type="text"/> National Insurance Number* <input type="text"/> - <input type="text"/> - <input type="text"/>
Date of birth*	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Place of birth*	<input type="text"/> Nationality* <input type="text"/>
3. Banking details - Please complete this with your new bank account details	
Name(s) of account holder(s)*	<input type="text"/>
Name of bank/building society*	<input type="text"/>
Branch sort code*	<input type="text"/> Bank/building society account number* <input type="text"/>
4. Your preferences*	
• I would like to pay my Annual Management Fee:	
By Direct Debit <input type="checkbox"/> or for Witan Investment Services to sell shares to cover the fee <input type="checkbox"/>	
• I would like dividends to be: Reinvested <input type="checkbox"/> or Paid out <input type="checkbox"/> (to my nominated bank account as in Section 3)	

5. Your instructions - Please complete this if you wish to set up regular payments to your Witan Wisdom account

Stock name in full* W I T A N I N V E S T M E N T T S T

Value £ .

Regular Sum
(minimum £50 per month or quarter for the Share Plan and £100 per month or quarter for the ISA)

Stock name in full* W I T A N P A C I F I C I N V T S T

Value £ .

Regular Sum
(minimum £50 per month or quarter for the Share Plan and £100 per month or quarter for the ISA)

Total Value £ .

Regular Sum

Your account will be debited on the 15th day of the month or next working day thereafter

For Regular Sum - Please advise frequency of payments required Monthly or Quarterly

Please note that there are maximum ISA subscription limits for each tax year, therefore the maximum you can invest will depend upon your contributions to any other ISA you may hold. Please see our Terms and Conditions for more information.

6. Direct Debit details - This must be completed to set up regular payments and/or pay you annual management fee (must be the same as Section 3)

Witan Investment Services Limited

Instruction to your bank or building society to pay by Direct Debit



Please fill in the form and send to: Witan Wisdom, PO Box 10550, Chelmsford CM99 2BA.

Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Service user number

6 9 8 4 4 1

Reference

Instruction to your bank or building society.

Please pay Witan Investment Services Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Witan Investment Services Limited and, if so, details will be passed electronically to my bank/building society.

Name(s) of account holder(s)

Signature(s)

Branch sort code

Bank/building society account number

Date

Banks and building societies may not accept Direct Debit Instructions for some types of account.

DDI5

Please note: For regular investors, if you have an existing Direct Debit and are changing your bank details, this will stop and be replaced by this new instruction.

7. Declaration*

I/we understand and accept that this application is made on the basis and subject to the current Witan Wisdom Important Information & Terms and Conditions. I/we have read and acknowledge the most recent version of the Key Information Document and the pre-sale (ex-ante) cost disclosure for Witan Investment Trust and/or Witan Pacific Investment Trust.

I/we declare the statements completed on this form are true and complete.

First account holder's signature*		Date* (XX/XX/XXXX)	/	/
Second account holder's signature* (where applicable)		Date* (XX/XX/XXXX)	/	/

Large empty area for signature and date.

For internal use only

Issued and approved by Witan Investment Services Limited. Witan Investment Services Limited is registered in England No. 5272533 of 14 Queen Anne's Gate, London SW1H 9AA. Witan Investment Services Limited provides investment products and services and is authorised and regulated by the Financial Conduct Authority. Calls may be recorded for our mutual protection and to improve customer service.

