

TOP-UP FORM



Mandatory fields marked with*

Please complete a separate form for each Witan Wisdom account you wish to top up. Complete this form in BLOCK CAPITAL letters, sign and return to Witan Wisdom, PO Box 10550, Chelmsford CM99 2BA. Please read this form in conjunction with the Witan Wisdom Key Features & Terms and Conditions. **Please note: if you have not topped up your Wisdom ISA account in the last tax year, you cannot use this form and you will need to complete a new ISA declaration.**

1. Personal details* (details we currently hold)	
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"/>
Email address*	<input type="text"/>
Date of birth*	<input type="text" value="DD"/> - <input type="text" value="MM"/> - <input type="text" value="YYYY"/>
Place of birth*	<input type="text"/> Nationality* <input type="text"/>
Your national insurance number*	<input type="text"/> - <input type="text"/> - <input type="text"/>
Your Witan product*	Wisdom ISA <input type="checkbox"/> Wisdom Share Plan <input type="checkbox"/>
Your Witan Wisdom Account Number*	<input type="text"/>
2. Your instructions - please instruct how much you would like to invest*	
Stock name in full*	W I T A N I N V E S T M E N T T S T
Value £	<input type="text"/> . <input type="text"/> Lump Sum £ <input type="text"/> . <input type="text"/> Regular Sum
Stock name in full*	W I T A N P A C I F I C I N V T S T
Value £	<input type="text"/> . <input type="text"/> Lump Sum £ <input type="text"/> . <input type="text"/> Regular Sum
Total Value £	<input type="text"/> . <input type="text"/> Lump Sum (Minimum £500) £ <input type="text"/> . <input type="text"/> Regular Sum (Minimum £100) for ISA, minimum £50 for Share Plan
Please include a cheque for this amount made payable to Witan Wisdom Client a/c. Your bank 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 <input type="checkbox"/> or Quarterly <input type="checkbox"/>	
Note for ISA investors: Maximum investment limits apply, please see our Terms and Conditions for information	

3. Direct Debit Details - Please complete this to set up regular payment or amend the amount on your existing payment

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

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Reference

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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)

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Signature(s)

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Branch sort code

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Bank/building society account number

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Date

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

DDI5

4. Your signature*

Please sign and date this form and return it together with a cheque and/or completed direct debit to Witan Wisdom, PO Box 10550, Chelmsford CM99 2BA. **I understand and accept that this application is made on the basis of and subject to the current Witan Wisdom Key Features & Terms and Conditions.**

Note for joint accounts: If you are adding another Witan Trust to your instruction and/or amending your direct debit amount or details, we require both account holders to sign this form.

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

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.

