

# Witan Wisdom 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  Mrs  Miss  Ms  Other title

Your last name\*

Your first name\*

Email\*

Your Witan product\* Wisdom ISA  Wisdom Share Plan

Your Witan Wisdom Account Number\*

### 2. Your instructions – please instruct how much you would like to invest\*

Stock name in full

Value £  Lump Sum  Regular Sum

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Stock name in full

Value £  Lump Sum  Regular Sum

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Total Value £  Lump Sum (Minimum £500) £  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  or Quarterly

**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 your 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**

**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. DDIS

**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.**

### 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.**

Signature  Date  For internal use only