

Your Registration Form -

Bates

Your Financial Guide

No extra cost to you! The cost of the Investment Review Service will be completely covered within the annual management charges you already pay. There is no additional cost.

How to register –

If you would like to benefit from our independent Investment Review Service, all you have to do is complete this Form and send it to us at the address detailed below.

 **What you need at hand**

The name of the PEP, ISA, OEIC or Unit Trust Company

You should find these details on a recent valuation statement.

This form confirms that you wish Bates Investment Services Limited to act as your 'Agent' for any investments you describe below. It also authorises the transfer of future trail commission to us, which will enable us to carry out the review process without charging you a fee. Changing agents does not affect your investment holdings, and any decision to switch investments remains entirely yours.

- If you have investments with more than one company, please complete a different panel for each
- If you have different investments with the same company, you can use one panel for all
- Each completed box must be signed and dated for your authorisation to be valid
- If you need additional Registration Forms simply print additional copies from our website - www.batesadvice.com

Name and Address

Please write clearly in CAPITAL LETTERS

Your name in full
(Mr/Mrs/Ms/Other)

Address including postcode

Telephone Home

Telephone Work

Date Of Birth

Notification to Transfer PEP, ISA, OEIC or Unit Trust Agency.

Please write clearly in CAPITAL LETTERS

Name of Investment Company

Your Signature

Date

Please transfer the Agency of my PEPs, ISAs, OEICs or Unit Trusts together with any trail commission to Bates Investment Services Limited, Devonshire House, 582 Honeypt Lane, Stanmore, Middlesex HA7 1JS. I authorise you to provide Bates Investment Services Limited with any information they request regarding my investments with you.

Notification to Transfer PEP, ISA, OEIC or Unit Trust Agency.

Please write clearly in CAPITAL LETTERS

Name of Investment Company

Your Signature

Date

Please transfer the Agency of my PEPs, ISAs, OEICs or Unit Trusts together with any trail commission to Bates Investment Services Limited, Devonshire House, 582 Honeypt Lane, Stanmore, Middlesex HA7 1JS. I authorise you to provide Bates Investment Services Limited with any information they request regarding my investments with you.

Notification to Transfer PEP, ISA, OEIC or Unit Trust Agency.

Please write clearly in CAPITAL LETTERS

Name of Investment Company

Your Signature

Date

Please transfer the Agency of my PEPs, ISAs, OEICs or Unit Trusts together with any trail commission to Bates Investment Services Limited, Devonshire House, 582 Honeypt Lane, Stanmore, Middlesex HA7 1JS. I authorise you to provide Bates Investment Services Limited with any information they request regarding my investments with you.

Notification to Transfer PEP, ISA, OEIC or Unit Trust Agency.

Please write clearly in CAPITAL LETTERS

Name of Investment Company

Your Signature

Date

Please transfer the Agency of my PEPs, ISAs, OEICs or Unit Trusts together with any trail commission to Bates Investment Services Limited, Devonshire House, 582 Honeypt Lane, Stanmore, Middlesex HA7 1JS. I authorise you to provide Bates Investment Services Limited with any information they request regarding my investments with you.

Notification to Transfer PEP, ISA, OEIC or Unit Trust Agency.

Please write clearly in CAPITAL LETTERS

Name of Investment Company

Your Signature

Date

Please transfer the Agency of my PEPs, ISAs, OEICs or Unit Trusts together with any trail commission to Bates Investment Services Limited, Devonshire House, 582 Honeypt Lane, Stanmore, Middlesex HA7 1JS. I authorise you to provide Bates Investment Services Limited with any information they request regarding my investments with you.



Important Information. Any information you provide will be held by The Money Portal Limited and its associated group companies in strictest confidence. We may occasionally contact you by letter, telephone, email or otherwise about products, seminars and services that may interest you.

If you do not want to receive any marketing information from us, please tick the box. Errors and omissions excepted.



Once you have completed the relevant parts of the form, please post this entire form to us at -
Bates Investment Review Service, Devonshire House,
582 Honeypt Lane, Stanmore, Middlesex, HA7 1JS.



Find out more about us
www.batesadvice.com



Can we help further?
Call us on **0845 013 8080**