

Investment Centre Regular Sale Form

(For James Hay Modular iSIPP, Modular ISA, Modular GIA, iSIPP, eSIPP, Private Client SIPP, Select SIPP and Wrap Only)



JHAY0674C

Application Guide

This form should be used to confirm any regular sale instructions from the Investment Centre investments through your Product.

Please complete this form in BLOCK CAPITALS and black ink.

Once completed, this Application Form may be either:

- (1) Posted to James Hay Partnership, Dunn's House, St Paul's Road, Salisbury, SP2 7BF, or
- (2) Faxed to 03333 206 353.

If you require any assistance, please call us on 03455 212 414.

1 Personal details

Applicant to complete

Full client name

Contact name

Product number

Contact telephone number

Financial Adviser company name

Country of residence

1a Product

Applicant to complete

Are you selling Investment Centre investments from a SIPP, Modular ISA, Modular GIA or Wrap? (Please tick one box only):

- SIPP
- Modular ISA
- Modular GIA
- Wrap

If you are selling through a Wrap, please tell us which product this form is for:

- Wrap Investment Portfolio
- Wrap ISA
- Wrap ISA (ex-PEP)
- Wrap Offshore Bond
- Wrap SIPP

Please complete a separate Investment Centre Regular Sale Form for each product type.

2 Frequency

Applicant to complete

Please confirm the frequency of the regular sales:

- Monthly
- Quarterly
- Half yearly
- Annually

Date of first regular sale (month)

OR

As soon as possible

We will arrange for the sales to be made as soon as is practicable after your selected start date, bearing in mind any constraints or limits imposed by the fund managers. This will normally be on or around a set date each month, the date being chosen at our discretion.

Client and Financial Adviser

I confirm the instructions in Section 3 to set up regular sales from the detailed funds.

Either: Client

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Financial Adviser

Or: Financial Adviser (on behalf of the Client)

Signature

Date

D	D	M	M	Y	Y	Y	Y
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James Hay Partnership is able to provide literature in alternative formats. The formats available are: Large Print (as recommended by RNIB), Braille, Audio Tape and PC Disk. If you would like to receive this document in an alternative format please contact us on 03455 212 414. For the hard of hearing and / or speech impaired, please use the Typetalk service via 18001 03455 212 414.

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