PRB Investment Instruction Form

Wealth Options
Product providers for financial advisors

Client Details

Name of PRB

Investment Instruction

Fund/ Investment Name	Amount to be invested

Please supply all marketing and compliance documentation to Wealth Options

Declaration

1. I wish for Wealth Options Ltd. to invest in the above mentioned product. I understand that this investment may be made by a Unit Trust and will be subject to the provisions of the Trust Deed as amended. I consent to Wealth Options Ltd. applying for units in the ARF Unit Trust on behalf of my PRB. Wealth Options Ltd. are trustees of the ARF Unit Trust and you may also be investing in a product either produced or promoted by Wealth Options Ltd. There is no conflict of interest here as Wealth Options Ltd. as trustees of the ARF Unit Trust will operate under the instruction of the beneficial owner of the PRB.

2. I hereby consent to the provision of information to the Revenue Commissioners if requested in relation to this investment.

3. I certify that I have received independent financial advice prior to the making of this investment. I understand that Wealth Options Ltd will not be involved in providing investment advice in relation to investments selected under the PRB named above. I understand that values can go up as well as down. I understand that if there is gearing (lending) involved in an investment there may be a higher degree of risk involved in that investment. All fees in the investment have been explained to me and I am satisfied with the fees.

4. If you decide to exercise your cooling off option on an insured product, your fund will be refunded less the adjustment for any downward movement in the unit price from the date of the investment to policy cancellation date.

Warning: If assets are held in an exempt unit trust, the provision of this product or service does not require licensing, authorisation or registration with the Central Bank and, as a result, it is not covered by the Central Bank's requirements designed to protect consumers or by a statutory compensation scheme.

Signature of PRB Beneficial Owner

Date

Data Protection Acts

The information that you have provided will be treated as confidential and retained by Wealth Options Limited ("Wealth Options") for the purposes of financial services or as required by law. You have a right to request a copy of the information we hold about you for which we may charge a small fee and to have any inaccurancies in your information corrected. Wealth Options may use the information you have provided for the purposes of providing you with additional information relating to the goods and services of Wealth Options, it's associated companies and/ or third parties. Wealth Options may share information with its associated and affiliated companies and/ or carefully selected third parties, to enable those associated and affiliated companies and/ or carefully selected third parties, to contact you directly in relation to their goods and services. If you do not agree to Wealth Options use of the information for such purposes, please tick the box provided. ☐

Brokerage Name:

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