



# ISA regular savings plan

## Amendment to Direct Debit

This form can be used to:

- change your fund choice or the amount you currently invest monthly
- change your bank or building society account details
- reinstate a Direct Debit instruction that has previously been cancelled

You must complete an 'Application for a stocks and shares ISA', rather than this form if you have not contributed to an ISA by Direct Debit in the previous tax year.

Please complete this form using BLOCK capitals

### Agent details

If you are not investing through a financial adviser, please leave this section blank and continue to section 02.

Note that agent codes are either 7 or 8 digits.

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01 Agent details - to be completed by your financial adviser	
Adviser name	
Company	
Address including postcode	
Agent code	
Firm reference number	
VAT registration no.	
With regard to the Distance Marketing directive please confirm what type of contract this is <input type="checkbox"/> Distance <input type="checkbox"/> Non-distance	
<b>Please indicate whether you are acting as the agent on all investments in this account, or on this transaction only</b> <input type="checkbox"/> All investments on this account <input type="checkbox"/> This transaction only	
<b>Non-advised (execution-only) investments:</b> <input type="checkbox"/> Please tick this box if you have <b>not</b> provided advice about this application and complete the special instructions below <input type="checkbox"/> % Discount <input type="checkbox"/> % Commission	
<b>Advised investments:</b> <input type="checkbox"/> Please tick this box if you <b>have</b> provided advice about this application	
02 About you - to be completed by you	
Account number	
Title (please tick)	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other please specify
Surname	
Other names (in full)	
Permanent residential address including postcode	
Date of birth	d d m m y y
Telephone	Daytime Alternative
<b>Data Protection Act</b> Please ensure you read and understand how we use the information you provide to us on this form. If you do not wish to receive information from us about our other products and services, please tick this box.	

### Data Protection Act

Any information you (or your representative) provide to us (or which we observe from the use you make of our products and services) may be processed and held by us, or transferred to other Invesco Ltd companies or to the group's service providers, business associates or agents, credit reference agencies and used for administration, assessment and analysis purposes (including market and product analysis and behaviour scoring, to check your identity, prevent and detect fraud and/or money laundering and to recover debts). We may also use it to develop and inform you about financial and other products and services we offer, and to protect the group's interests. This may involve transfers outside the European Economic Area (EEA), including the USA, to countries where data protection laws may not be as strong. However, it will be processed and maintained to the same standards as if it were still within the EEA. By providing us with this information, you consent to these transfers and uses, and to any disclosure required by law. Our Privacy Policy is available upon request.

### 03 To change your fund choice or monthly payment amount

**New monthly payment** (if applicable)  I would like to change my monthly payment to a total of  
£

**Payment details** Date monthly payments to start:  m  m  y  y (e.g. March 2013 = 0313)  
We will collect the new amount on the same day of the month as we currently do.

**Funds you would like to invest in** Please list all the funds you would like to invest in and the monthly amount for each fund, including existing choices you would like to continue.

Existing and/or new fund name	Monthly investment (min £20 per fund)			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please complete the relevant sections of the form overleaf, 'To invest by Direct Debit' and return it along with this form.

### 04 Your declaration and signature

I confirm that I have been provided with the latest available Invesco Perpetual Key Investor Information Document(s), the Supplementary Information Document and ICVC ISA Key Features and Terms & Conditions.

Your signature

Date  d  d  m  m  y  y

#### Our range of funds

For a description of the funds we offer, please see the relevant Key Investor Information Document(s), or visit our website [www.invescoperpetual.co.uk](http://www.invescoperpetual.co.uk)

#### Only accumulation shares are available when investing in regular savings plans.

#### More information

If you would like more information including our Prospectuses and Annual or Interim Short Reports for any of our funds before you invest, please visit our website [www.invescoperpetual.co.uk](http://www.invescoperpetual.co.uk) or call us on 0800 085 8677.

#### Please return your completed form to:

Invesco Perpetual  
PO Box 11150  
Chelmsford  
CM99 2DL, UK

If you have any questions please speak to your financial adviser or contact us on:

Telephone 0800 085 8677  
Textphone 01491 576104  
Facsimile 01491 416000

[www.invescoperpetual.co.uk](http://www.invescoperpetual.co.uk)

Telephone calls may be recorded.



