

Top Up Form

For Intermediary use only:

Cofunds IFA Authorisation Code: **97**

We are unable to process any form without this code.

Intermediary Client/Deal Ref. (if applicable):

Nominated Intermediary Details:

Allenbridge Group Plc
17 Hill Street
Mayfair
London, W1J 5NZ

1. Account Details

Please complete using black ink and BLOCK CAPITALS and return to: **Allenbridge Group Plc, 17 Hill Street, Mayfair, London, W1J 5NZ.** You should refer to the Notes overleaf in section 6 before completing this instruction.

Please complete this section in full

Mr/Mrs/Ms/Miss/Other
Surname
Full First Name(s)
Permanent Residential Address
Postcode

Daytime Tel No. (inc STD)

Designation (*investment funds only*)

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Existing Cofunds Client Reference

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Your client reference can be found on your latest confirmation note or statement.

Company

Company Name
Contact Name
Permanent Residential Address
Postcode

Daytime Tel No. (inc STD)

Designation (*investment funds only*)

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Existing Cofunds Client Reference

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Company Registration Number

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2. Top Up Details

Please indicate below your investment choices and the amount you wish to subscribe

Fund Management Company	Fund Name	Type of Unit/Share (Inc/Acc)	Lump Sum*	Monthly**	% Initial Commission Waived***
			£	£	100%
			£	£	100%
			£	£	100%
			£	£	100%
			£	£	100%
			£	£	100%
			£	£	100%

This top up applies to my ISA Investment Fund

Total Investment Amount	£	£
Cash Reserve [†]	£	£

[†] Monies may be held for short periods of time in the Cash Reserve. Such holdings are deemed 'destined for investment.'

- For ISAs:**
- * Investment Limits
 - Lump Sum - Minimum investment is £1,000. This can be split across funds with a minimum of £1,000 per fund.
 - You may subscribe up to a maximum of £7,000 per year into a Maxi Stocks and Shares ISA (£3,000 for a Mini Stocks and Shares ISA).
 - ** Monthly investment
 - Monthly Savings - Minimum investment of £50 per month, per fund on top of an existing saving of at least £100 per month. Please show the new total amount you wish to save including your existing saving.
- *** For intermediary use only.
- For Investment Funds:**
- * Investment Limits
 - Lump sum - Minimum investment is £1,000. This can be split across funds with a minimum of £1,000 per fund.
 - We do not accept monthly contributions for investment funds.
- Your cheque**
- I enclose my cheque made payable to Cofunds Limited for the amount specified and/or my completed Direct Debit instruction, if applicable.

3. Investment by Direct Debit for Monthly Savers (applies to ISAs only)

Instruction to your Bank or Building Society to pay Direct Debits
Please fill in the form and send it to: **Cofunds Limited, PO Box 6168, Basildon, SS14 0YQ**
Name and full postal address of your Bank or Building Society



To the Manager	Bank or Building Society
Address	
Postcode	

Name of Account Holder	
Bank/Building Society Account Number	Branch Sort Code
Reference Number (office use only)	
Originator's Identification No. (office use only)	

Instruction to your Bank or Building Society
Please pay Cofunds Limited Direct Debits from the account detailed on this instruction subject to the safeguards assured by The Direct Debit Guarantee. I understand that this instruction may remain with Cofunds Limited and, if so, will be passed on electronically to my Bank/Building Society. Banks and Building Societies may not accept Direct Debit instructions for some types of account.

Signature	Date
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