

Share Plan Top-Up Form

Mandatory fields marked with*

Please complete and sign this form and return it to Witan Wisdom, PO Box 10550, Chelmsford CM99 2BA


1. Your personal details – please use CAPITALS*

Witan Wisdom Account Number

First Name

Surname

2. Please complete section 2 if you wish to set up regular payments or amend the bank details on your existing instructions.

Witan Investment Services Limited Instruction to your bank or building society to pay by Direct Debit		
<small>Please fill in the form and send to: Jump, PO Box 10828, Chelmsford CM99 2BN. Name and full postal address of your bank or building society</small>		
To: The Manager Bank/building society	Service user number 6 9 8 4 4 1	Reference <input type="text"/>
Address Postcode	Instruction to your bank or building society. Please pay Witan Investment Services Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Witan Investment Services Limited and, if so, details will be passed electronically to my bank/building society.	
Name(s) of account holder(s) <input type="text"/>	Signature(s) <input type="text"/>	
Branch sort code <input type="text"/>	Bank/building society account number <input type="text"/>	Date <input type="text"/>
Banks and building societies may not accept Direct Debit Instructions for some types of account.		
DD15		

Please note: For regular investors, if you have an existing Direct Debit and are changing your bank details, this will stop and be replaced by this new instruction.

3. Your instructions – please instruct how much you would like to invest*

Stock name in full	W I T A N I N V E S T M E N T T S T	
Value £	<input type="text"/> Lump Sum	<input type="text"/> Regular Sum
Stock name in full	W I T A N P A C I F I C I N V T S T	
Value £	<input type="text"/> Lump Sum	<input type="text"/> Regular Sum
Total Value £	<input type="text"/> Lump Sum (Minimum £500)	<input type="text"/> Regular Sum (Minimum £50)
Please include a cheque for this amount made payable to Witan Wisdom Client a/c.		Your bank account will be debited on the 15th day of the month or next working day there after.
For Regular Sum – Please advise frequency of payments required: Monthly <input checked="" type="checkbox"/> or Quarterly <input checked="" type="checkbox"/>		

4. IFA (Independent Financial Adviser) Use Only

IFA FSA code

Initial Commission % (0% or 3%)

5. Your signature*

Please sign and date this form and return it together with a cheque and/or direct debit to Witan Wisdom, PO Box 10550, Chelmsford, CM99 2BA.

Signature

Date

Issued and approved by Witan Investment Services Limited. Witan Investment Services Limited is registered in England No. 5272533 of 14 Queen Anne's Gate, London SW1H 9AA. Witan Investment Services Limited provides investment products and services and is authorised and regulated by the Financial Services Authority. Calls may be recorded for our mutual protection and to improve customer service.