

Triodos Bank.

Ethical Stocks and Shares ISA switch form.

If you have any queries when completing this form, please speak to your financial advisor or call us on 0330 355 0355

Ethical Stocks and Shares ISA number

<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"/>
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Section 1: Your details

Title Mr / Mrs / Ms / Miss / Dr / Other

First name(s)

(for identification purposes, please use your full name and not a nickname)

Surname

Male Female

Permanent Residential Address

Postcode

Telephone (home*)

Mobile*

Email*

(*if you are happy to be contacted by telephone and email in the future)

If the details you provide as part of this application are different to the details we currently hold, then we may change your existing record. You may be contacted to verify this change or to request further confirmation.

Confirmation and Declaration

I confirm that I have read and understood in full the information contained in the relevant Key Investor Information Document(s).

Signature

Date

<input type="text"/>	<input type="text"/>	,	<input type="text"/>	<input type="text"/>	,	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 2: Switch Instruction

Please give details of the funds you wish to switch. To make your selection, complete one of the following options below, either A, B or C.

Please note, if your switch constitutes an initial investment to another fund, the switching amount will need to be a minimum of £1,000.

If you are not switching the whole of your investment from the fund you are switching from a minimum of £500 must remain in that fund.

The shares you have selected will be sold and the settlement reinvested into the other fund on the same basis, i.e. distribution or capitalisation unless otherwise stated.

Option A: Value

Fund(s) to switch shares FROM	Value of shares to be switched FROM	
	Distribution Shares	Capitalisation Shares
Triodos Sustainable Equity Fund	£ <input type="text"/>	£ <input type="text"/>
Triodos Sustainable Pioneer Fund	£ <input type="text"/>	£ <input type="text"/>

Option B: Shares

Fund(s) to switch shares FROM	Number of shares to be switched FROM	
	Distribution Shares	Capitalisation Shares
Triodos Sustainable Equity Fund	£ <input type="text"/>	£ <input type="text"/>
Triodos Sustainable Pioneer Fund	£ <input type="text"/>	£ <input type="text"/>

Option C: Switch all

Fund(s) to switch shares FROM	Switch all shares
Triodos Sustainable Equity Fund	<input type="checkbox"/>
Triodos Sustainable Pioneer Fund	<input type="checkbox"/>

Please return this completed form to:

Freepost RTAB-JGZR-BUHK
 Triodos Bank
 T. Bailey Asset Management Ltd
 64-66 St James's Street
 Nottingham
 NG1 6FJ

Telephone: 0330 355 0355
contact@triodos.co.uk
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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