

Triodos Bank.

Socially Responsible Investment Funds switch form.

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

Socially Responsible Investment Fund number

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Section 1: Your details

First account holder

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)

Second account holder

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.

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	
Triodos Sustainable Equity Fund	Distribution Shares £	Capitalisation Shares £
Triodos Sustainable Pioneer Fund	Distribution Shares £	Capitalisation Shares £

Option B: Shares

Fund(s) to switch shares FROM	Number of shares to be switched FROM	
Triodos Sustainable Equity Fund	Distribution Shares £	Capitalisation Shares £
Triodos Sustainable Pioneer Fund	Distribution Shares £	Capitalisation Shares £

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"/>

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.

Triodos Bank NV (incorporated under the laws of the Netherlands with limited liability, registered in England and Wales BR3012). Authorised by the Dutch Central Bank and subject to limited regulation by the Financial Conduct Authority and Prudential Regulation Authority. Details about the extent of our regulation by the Financial Conduct Authority and Prudential Regulation Authority are available from us on request. Registered office: Triodos Bank, Deanery Road, Bristol, BS1 5AS.

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TB/SRI.SF/JUN15

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Section 3: Confirmation and Declaration

If this is a joint account we require signatures from both account holders.

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

Signature – First account holder

Date

D	D	/	M	M	/	Y	Y	Y	Y
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Signature – Second account holder

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