

Triodos Bank. Impact Investment Funds top up form.

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

This top up form should not be used to top up a Stocks & Shares ISA, the Stocks & Shares ISA top up form can be found at: triodos.co.uk/ssisa

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. We have indicated in the form where details will be automatically updated.

This form should be completed either by printing a blank copy and filling in the required fields, or by filling in the fields online and then printing and signing the form.

If you are filling in this form by hand, please use BLOCK CAPITALS.

Please send your completed form to:

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

Our freepost address is Royal Mail registered and simple to use - write it on your envelope exactly as shown above (no stamp required) and your letter will get to us free of charge by second class mail.

Alternatively, for first class mail, you can post your form to us in the normal way, simply copy our above address without the first line.

Impact Investment Funds number

Section 1: Your details

First account holder

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

First name(s)

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

Surname

Permanent Residential Address

Postcode

Telephone (home*)

Mobile*

Email*

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

If we already hold your address, telephone or email details, they will be updated with information you have provided in this section.

Second account holder

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

First name(s)

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

Surname

Permanent Residential Address

Postcode

Telephone (home*)

Mobile*

Email*

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

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Section 2: Top up instruction

Please give details of the investment(s) you would like to make

The minimum initial investment per fund is £1,000.
The minimum lump sum top up per share class is £500.

Fund options	Sum to be invested	
	Distribution shares (income will be paid to your nominated account)	Capitalisation shares
Triodos Global Equities Impact Fund		
Triodos Pioneer Impact Fund		
Triodos Sterling Bond Impact Fund		

If you are investing in a different fund to your existing investment, please make sure you have read the relevant Key Investor Information Document.

Please tell us how you would like to make this investment by ticking the relevant boxes below.

By electronic bank transfer

The transfer must be received within 10 days of us receiving this application. Please contact your sending bank to carry out the instruction. It must be sent from a sterling account in your own name(s) with another UK bank/building society. Please give details on the next page.

Bank or Building Society name:

Account holders' name:

Sort code:

- -

Account number:

Payment should be made to the following account:

Triodos Bank Transactional Client Money

Sort Code: 60-00-04

Account number: 10019561

When transferring money please put your name as the payment reference.

By transfer from your existing UK Triodos Bank account

Please transfer _____ from

Triodos Bank account holder name(s)

Triodos Bank account number

For fund administrator use only

Payment reference number

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If the existing UK Triodos Bank account is a joint account which is jointly operated we will require both account holders to authorise the payment.

Please note that unless already a joint share holder, the second holder is only authorising the money transfer and will not be authorised to operate this account.

We will carry out this transfer on your behalf. If your existing Triodos account has a notice period, it will be waived and no early access charge applied as long as the transfer is for no more than £100,000. Transfers that exceed this amount may experience delays.

First account holder signature

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Date

/ /

Second account holder signature

--

Date

/ /

Section 3: Confirmation and declaration

If this is a joint investment 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).

First account holder signature

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Date

/ /

Second account holder name

--

Date

/ /

Please return this completed form by post to:

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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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TB/SRI.TUF/FEB21