

# Triodos Bank. Socially Responsible 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](http://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.

Socially Responsible Investment Funds number

## 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)

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

## 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 Sustainable Equity Fund	£ <input type="text"/>	£ <input type="text"/>
Triodos Sustainable Pioneer Fund	£ <input type="text"/>	£ <input type="text"/>

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 cheque**

This cheque must be from a personal account in your own name(s). The cheque should be made payable to **Triodos Bank Client Money**.

I enclose a cheque for: £

**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:**

Account name: **Triodos Bank Client Money - Transactional**

Sort Code: **08-90-02**

Account number: **68380911**

When transferring money please use your name(s) 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

If the existing UK Triodos Bank account is a joint account which is jointly operated we will require signatures from both account holders.

Please note that unless already a joint share holder, the second signatory 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.

**Signature – First account holder**

Signed

Date

 /  / 

**Signature – Second account holder**

Signed

Date

 /  / 

**For fund administrator use only**

Payment reference number

**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**

Signed

Date

 /  / 

**Second account holder**

Signed

Date

 /  / 

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: 0845 769 7239

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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**Triodos Bank**