

Triodos Bank.

Ethical Stocks & Shares ISA and Impact Investment Funds switch form.

If you have any queries when completing this form, please call us on 0330 355 0355

Please indicate here which account these instructions apply to.

Please complete a separate form for each account you wish to switch funds in.

This form should be completed by filling in the required fields online, and confirming you have read and agreed to the declaration under 'Section 3' by clicking the tick box.

Completed forms should be emailed to: clientservices@tbailey.co.uk

Impact Investment Fund account number, or

Ethical Stocks & Shares ISA account number

Section 1: Your details

Please complete the below using block capitals

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 (non-ISA Impact Investment funds only)

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 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 must keep a minimum fund balance of £500.

You can provide us with two switch instructions per form.

Switch from:

Fund name	Share class	Value or	%
		£	%

Switch to:

Fund name	Share class	%
		%
		%
		%
Total		% 100

Switch from:

Fund name	Share class	Value or	%
		£	%

Switch to:

Fund name	Share class	%
		%
		%
		%
Total		% 100

Section 3: Confirmation and Declaration

If this is a joint account we require confirmation 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

First account holder name

Date

 / /

Second account holder (non-ISA Impact Investment funds only)

Second account holder name

Date

 / /

Please return this completed form by email to:
clientservices@tbailey.co.uk

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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