

# Triodos Bank. Investment Funds Purchase form.

This form allows you to purchase shares for your Impact Investment or Stocks & Shares ISA.

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

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 indicate below which account this instruction applies to.

If you have multiple Impact Investment Accounts, please complete a separate form.

Impact Investment Funds number

Stocks & Shares ISA number

## Section 1: Your details

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### 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 (Impact Investment Only)

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.

## Section 2: Purchase instruction

Please ensure that the sum to be invested has been deposited into your Impact Investment Cash account or Stocks & Shares ISA Cash account Before completing this form.

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

The minimum initial investment per fund and share class is £250.  
The minimum lump sum investment per fund and share class is £250.

Fund options	Sum to be invested	
	Distribution shares (income will be paid to your cash account)	Capitalisation shares
Triodos Global Equities Impact Fund		
Triodos Pioneer Impact Fund		
Triodos Future Generations 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.

## 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

Date

/ /

Second account holder name

Date

/ /

Please return this completed form by post to:  
FREEPOST TRIODOS BANK

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 using the below address:


Triodos Bank  
Deanery Road  
Bristol  
BS1 5AS

Telephone: 0330 355 0355  
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/JAN24