# Irrevocable Gift Form / Deed of Gift Form



**Application form -** To confirm the source of funds being gifted by the donor to the recipient for this investment.

### How to fill in this form:

- Please use black ink and write clearly inside the boxes provided using capital letters
- Mark your answers with a cross in the appropriate box like this:
- If you make a mistake, please correct it but don't use correction fluid
- All information on this form except 'if applicable' are mandatory and may incur delays or could be returned if not completed.
- If you have any queries about this form please ask your adviser, or ring ServiceLine on **0800 358 4060.**

#### What's next?

Please send your completed application form to: **Fidelity** 

PO Box 391 Tadworth KT20 9FU

All fields are mandatory and all joint holders MUST complete this form and sign the relevant application form.

1 About you - the donor
Title
Surname
First and other names in full
<b>Your residential address -</b> 'Care of' and PO Box addresses are not allowed for regulatory reasons. By entering your address you are confirming that you are a UK resident. Only UK addresses are eligible unless you are a Crown Employee or British Forces Posted Overseas (BFPO) or the spouse/civil partner of a Crown Employee or British Forces Posted Overseas (BFPO). House number/name
Street, city, county and country
Postcode Image: Contract of the second
Date of birth (DDMMYYYY)
Source of this investment
Savings from income Inheritance Income from salary
Divorce Settlement Gift
Sale of Property Sale of Investments/transfer
Other (Please specify)
If Employed/Self-Employed, please confirm your main profession:
Industry (e.g financial services/manufacturing)
Position (e.g. manager)

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## 2 About you - the recipient

Mr Mrs Ms Other: Other Other<
Surname
First and other names in full
<b>Your residential address -</b> 'Care of' and PO Box addresses are not allowed for regulatory reasons. By entering your address you are confirming that you are a UK resident. Only UK addresses are eligible unless you are a Crown Employee or British Forces Posted Overseas (BFPO) or the spouse/civil partner of a Crown Employee or British Forces Posted Overseas (BFPO).
House number/name
Street, city, county and country

Postcode

## **3** Declaration and signature

- We confirm that this money is money for the sole purpose of investment. I, as the donor, understand this gift is irrevocable.
- We have read and accept the relevant Key Features Documents Doing Business with Fidelity or the Fidelity Adviser Solutions Client Terms and Doing Business with Fidelity Adviser Solution documents to which this gift relates
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein
- My personal data as provided on this application form will be processed in accordance with the Fidelity Adviser Solutions Client Terms or Doing Business with Fidelity document as appropriate

A signature is required by both parties.

#### Donor

Print name		
Date signed	(DDMMY	YYY)

#### Recipient



Print name

## Date signed



(DDMMYYYY)

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