



Income Form

Company, Charity, Pension Trust and Private Trust accounts

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:
- Any applications received that are not completed correctly may incur delays

Who we can make the payment to:

- For pension trusts, the bank account must be held for the pension scheme.
- For companies and charities, the name of the bank account must be the same as the account name.

- For trusts, the bank account can be in the name of the trust itself, one or more of the trustees or specified beneficiaries. (Please remember that we can only make payments to trustees and beneficiaries if we have verified their identities).

What's next?

Please send your completed application form to:

Fidelity
PO Box 391,
Tadworth,
KT20 9FU

1 About the account

Account number

1.1 - Name of a trustee for private trust

Surname

First and other names in full

Telephone number

1.2 - Name of the company, charity, pension trustee or scheme

Details for the corporate body or scheme in case of any queries for this instruction

Surname

First name

Telephone number

Email address

4 Declaration and signature

By signing this form, I/We declare that:

- I/We understand that the information I/we provide on this application form will be processed in accordance with Fidelity's privacy statement, a link to which is contained in the Fidelity Client Terms or the "Your personal information" section of the Fidelity Adviser Solutions Client Terms (as applicable). I/We understand that such information will be held in confidence and not passed to any company other than as outlined without my/our permission or unless required by law
- The information I/we have given is correct to the best of my knowledge, and I/We will tell Fidelity immediately if any of it changes.
- I/We have read and agree the latest Fidelity Client Terms or the Fidelity Adviser Solutions Client Terms (as applicable)
- I/We I have read and agree the latest Key Features Document, either Doing Business with Fidelity or Doing Business with Fidelity Adviser Solutions (as applicable)
- I/We have read the latest key information document
- I/We have read the illustration document

For Corporate bodies, we need the signatures of two authorised signatories, unless the signatory list states that one is enough. Please provide an up to date signatory list with this form.

For Trust accounts, all trustees must sign.

FIRST CORPORATE BODY SIGNATURE

FIRST CORPORATE BODY PRINT NAME

SECOND CORPORATE BODY SIGNATURE

SECOND CORPORATE BODY PRINT NAME

SIGNATURE OF FIRST TRUSTEE

PRINT NAME

SIGNATURE OF SECOND TRUSTEE

PRINT NAME

SIGNATURE OF THIRD TRUSTEE

PRINT NAME

SIGNATURE OF FOURTH TRUSTEE

PRINT NAME

Date signed

(DDMMYYYY)

FOR OFFICE USE ONLY