



# Ready-made Lifetime ISA regular investing

Please complete and return this form to start investing regularly. To amend existing instructions, please call our Dealing team on 01296 41 42 43.

## Section 1: Your details

Customer reference

Title  Surname  Forename

Phone  Email

## Section 2: Investment details

Specify the fund or funds that you would like to invest in and the breakdown of the monthly amount (minimum £10 per month per fund). If you'd prefer to just set up a regular cash payment, please complete the cash payment field. You can then invest the cash into your chosen fund.

Monthly amount (£)

Cautious fund

Balanced fund

Adventurous fund

Cash payment only

Account number

(where you wish your investment to be held)

First payment date  1  6  M  M  Y  Y

Allow at least 10 working days from returning this form and your first debit date.

## Section 3: Authorisation

### I authorise The Share Centre Limited:

To collect my payment by direct debit as detailed. I understand where the chosen date is not a business day, my payment will take place on the next business day. Should I wish to cancel, suspend or amend my payment I will advise you in writing at least two business days before the next payment.

To make the purchase(s) detailed above, including all charges. Where an investment has a Simplified Prospectus, KIID or KID I have read and kept a copy of the relevant document(s).

I confirm that the bank account detailed in this instruction is in my name and I have the capacity to authorise Direct Debits to be drawn upon the nominated account.

My signature confirms all the statements and instructions on this form.

Signature  Date

Print and sign here

Please note, existing customers who have not used any of their accounts recently may need to provide additional identification. If unsure please call us 01296 41 41 41.

## Section 4: Instructions to your bank or building society to pay by direct debit



Bank/building society  Originator's ID number  601159

Branch address

Name(s) of account holder(s)  Bank/building society number

For office use only  (reference to be used on all payments) Sort code

### Instruction to your bank or building society

Please pay The Share Centre Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with The Share Centre Limited and, if so, details will be passed electronically to my bank/building society.

Signature  Date

Print and sign here

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### The Direct Debit Guarantee (please retain for your records)

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit The Share Centre will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request The Share Centre to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit by The Share Centre or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society
- If you receive a refund you are not entitled to, you must pay it back when The Share Centre asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



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