

Your fund appointment form

Bestinvest can help you manage your investment portfolio with ease online – even those ISAs and Unit Trusts taken out with other providers. Appoint us as your broker and we can access your unit holding data and incorporate your complete portfolio within our consolidated valuations and asset allocation analysis. Please note that individual equities or self-select ISAs will be added at our discretion.

Complete a separate change of agency notice for each plan manager currently within your portfolio if you would like an immediate valuation. We can obtain this independently but it does take longer. Each change of agency notice must be signed by the registered owner of the investment.

Please return the form to us with an original signature (photocopies are not accepted). If you have any questions or require further information, please do not hesitate to contact us by email team@bestinvest.co.uk or call 0845 053 3427.

Your change of agency notice

ISA <input type="checkbox"/> None <input type="checkbox"/>	Plan Manager / Fund Supermarket <input type="text"/>		
Account number(s) <input type="text"/>	National insurance Number <input type="text"/>		
Your full name <input type="text"/>			
Address <input type="text"/>			
Email <input type="text"/>	Postcode <input type="text"/>		
Fund names <input type="text"/>	No. of units <input type="text"/>	Inc. or Acc. units <input type="text"/>	
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Dear Manager,

Please note that I have now appointed Bestinvest (Brokers) Ltd as my broker for this plan. Please immediately amend your records to reflect this and supply them with details of my holdings. I understand that any commission payable on this plan will now be directed to Bestinvest rather than my previous financial adviser.

Signed _____

Date _____

Agent: Bestinvest (Brokers) Ltd, Reg. No. 2830297 and Bestinvest (Consultants) Ltd, Reg. No. 1550116 are both registered in England. Registered address: 6 Chesterfield Gardens, Mayfair, London W1J 5BQ. Authorised and regulated by the Financial Services Authority.

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