

Instruction To Amend Initial Or Ongoing Payments (Platform)



PLEASE PRINT CLEARLY IN BLOCK CAPITALS AND COMPLETE ALL APPLICABLE SECTIONS OF THIS FORM.

Section 01 Client details

Your account number:

Client name:

Section 02 Initial payments to be updated

You agree to your Financial Adviser receiving the below payment per contribution into the listed portfolio(s), including any transfers and regular contributions:

Portfolio number(s):

Percentage Value or Fixed Value:

% or £

% or £

% or £

% or £

The initial fee will change from the date we receive the form.

Section 03 Ongoing charges to be updated

You agree that your Financial Adviser will receive an ongoing fee (as a % of the value of your investments or a fixed value) as specified below:

Portfolio number(s):

Percentage Value or Fixed Value (per annum):

% or £

% or £

% or £

% or £

Please note that any changes will be effective from the first of the following month.

Values are calculated using average daily asset balances.

Section 04 Signature

By signing this form, you:

- confirm that you have discussed and agreed with your Financial Adviser each of the charges set out above;
- instruct 7IM to deduct the charges from your account(s) and to pay the amounts deducted to your Financial Adviser or as they otherwise instruct. In making these payments 7IM will be acting as the agent of your Financial Adviser;
- authorise 7IM to accept any instruction from your Financial Adviser as to which portfolio or account to first deduct fees and charges from; and
- agree that unless and until 7IM receives written notice from you to amend or cancel the instructions given below, 7IM will continue to make payments to your Financial Adviser as set out in this form.

Your signature(s) is required for the completion of this form

Signature:

Signed by (please PRINT name):

Date:

Your signature(s) is required for the completion of this form

Second Signature / Joint Holder (if applicable):

Signed by (please PRINT name):

Date: