

Third party authorisation



0845 0700 720
www.selftrade.co.uk

Both the account holder ('you') and the person to whom authority is to be delegated ('the agent') should complete this form. This third party authorisation is supplementary to our Terms and Conditions. On completion and submission of this form you will be subject to our Terms and Conditions.

Authorisation

You hereby authorise the individual whose details appear below ('the Agent') as your agent to give instructions in respect of buying, selling and dealing in general, to exercise rights over, to convert, to arrange, enter into and carry out transactions in and give instructions relating to the transferring of funds to and from, your Selftrade account.

You authorise Selftrade to accept and act on all such orders and instructions received from the Agent relating to your Selftrade account.

You hereby confirm agreement with all orders and instructions received by Selftrade from the Agent relating to your Selftrade account.

Notwithstanding the above authorisation of the Agent, you will continue to be able to give instructions and orders to us in accordance with our Terms and Conditions. In the event of any contradictory instructions or orders being received, we will be entitled to act on the instruction or order first received by us.

Instructions to open a Selftrade account, transfer an account to or from Selftrade or close a Selftrade account, will only be accepted from you in accordance with our Terms and Conditions.

You agree that Selftrade will not be responsible for any losses, costs, liabilities or expenses incurred by you as a result of any dispute between you and the Agent in respect of any matter connected to your Selftrade account or any contradictory instructions or orders received from you and the Agent.

Account number and PIN

No separate PIN or account number will be issued by Selftrade to the Agent. You are reminded that, notwithstanding any disclosure to the Agent of your account number, PIN or any other personal details, you are, and continue to be, responsible for the confidentiality and use of them.

Contract Notes and statements

Contract notes, statements and other confirmations relating to your Selftrade account will continue to be sent to you (and not the Agent) in accordance with the Terms and Conditions.

Agreement of the Agent

The Agent:

- confirms he/she is over 18 years of age (date of birth must be confirmed overleaf);
- agrees that Selftrade may use third party sources to verify the Agent's identity, including home address details
- agrees to indemnify us and our agents and associated companies against any losses, costs, liabilities or expenses incurred by us or them arising directly or indirectly from any breach by the Agent of this third party authorisation;
- agrees to comply with all applicable laws, rules and regulations in exercising the Agent's authority hereunder including, without limitation, the Financial Services and Markets Act 2000, and
- agrees that this third party authorisation constitutes the entire agreement between the Agent and Selftrade in relation to the subject matter hereof.

Termination

You may terminate this third party authorisation at any time by informing us in writing. Termination will take effect only once we have received your written instruction.

Account holder's details

you **must** complete all fields marked *

please use **CAPITALS**

Title* Mr Mrs Miss Ms

Surname*

Forenames*

Signature of account holder*

Selftrade account number

Other title

Date*

Agent's details

Title* Mr Mrs Miss Ms

Surname*

Forenames*

Permanent residential address*

Postcode*

Daytime phone*

Evening phone

Mobile phone

Email address

Signature of agent*

Selftrade account number if applicable

Other title

Any other surname used in last 3 years

Date of birth*

Previous address* if you have moved in the last 2 years

Postcode*

Nationality*

Date*

Supporting documentation

Agent – Account Holder

Please indicate your account number above. You do not need to provide any supporting documentation.

Agent – Non-account Holder

Please include supporting documentation as detailed below. Your name and address must be displayed on the bill or statement, which **must** be an original **and** less than three months old. **Photocopies cannot be accepted.** We will return original documents to you as soon as we have processed the authorisation request. Occasionally we may need additional supporting documentation, in which case we will contact you.

UK residents:

If you have been at your current address for more than two years and are on the current Electoral Roll, please include **one** of the following:

- Gas, electricity or fixed line telephone bill. Mobile phone and internet utility bills cannot be accepted
- Bank statement. Internet bank statements cannot be accepted
- Credit card statement
- Local authority bill for the current year

If you have been at your current address for less than two years, please include **one** of the following:

- Gas, electricity or fixed line telephone bill. Mobile phone and internet utility bills cannot be accepted
 - Bank statement. Internet bank statements cannot be accepted
 - Credit card statement
 - Local authority bill for the current year
- plus one of the following:**
- A current HM Revenue & Customs Tax Notification, **or**
 - Certified copy of your current UK driving licence, **or**
 - Certified copy of your current signed passport.

The certified copies must be officially stamped and signed together with the following statement 'certified as a true copy of the original' **by a UK lawyer, bank manager, or accountant. The person certifying your documents must give his/her full name, address and daytime telephone number.**