

Please return your completed form together with a new Letter of Authorisation signed by the members of the Club to:  
Selftrade, Account Management, Boatman's House, 2 Selsdon Way, London E14 9LA.

On completion and submission of this form you will be subject to our Terms and Conditions.

## Section A Lead Investor details you must complete all fields marked \* please use CAPITALS

The Lead Investor is the Club member who will trade on behalf of the Club. All correspondence will be sent to the address of the Lead Investor.

**Full name of Investment Club\***

**Selftrade account number\***

### Previous Lead Investor

**Title\*** Mr  Mrs  Miss  Ms  Other title

**Surname\***

**Forenames\***

### New Lead Investor

If you hold an individual Selftrade account only enter your surname, forenames and account number and then complete Sections B and C.

**Selftrade account number** if applicable

**Title\*** Mr  Mrs  Miss  Ms  Other title

**Surname\***

**Forenames\***

**Permanent residential address\***

**Postcode\***

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

**Postcode\***

**Any other surname** used in last 3 years

**Mother's maiden name\*** for security purposes

**Date of birth\***

**Nationality\***

**Daytime phone\***

**Evening phone**

**Mobile phone**

**Email address 1**

**Email address 2**

## Section B New PIN

Please complete this section to change the Club's PIN. It may take up to 4 working days for the new PIN to arrive. It will be possible to place trades over the phone while you wait for the new PIN to arrive.

**Immediately**

**Please disable the Club's PIN with immediate effect and issue a new PIN**

Please tick one

**On a specific date**

**Please issue the Club with a new PIN on a specified date.**

The current PIN will be valid until this date. Please provide us with at least 3 working days notice.

Date

DD / MM / YYYY

## Section C Declaration

### Read and sign - Previous Lead Investor

I confirm that I am no longer the Lead Investor of the Investment Club listed in Section A

Signature  
of previous Lead  
Investor\*

Date\*

DD / MM / YYYY

### Read and sign - New Lead Investor

I have been appointed as Lead Investor of the Investment Club listed in Section A, and have read, understood and agreed to the Selftrade Terms and Conditions.

Signature  
of new Lead  
Investor\*

Date\*

DD / MM / YYYY

I have enclosed the following:

- A copy of the Club's minutes appointing me as the new Lead Investor. The minutes are signed by the previous Lead Investor, one Club member and me.
- New Letter of Authorisation signed by the members of the Club.

Please make the changes to the Club's account as instructed.

## Supporting documentation

### Club members - Existing customers

Please indicate your account number in Section A. No further documentation is required.

### Club members - New customers

Bank statements and bills **must** be originals **and** less than 3 months old. **Photocopies cannot be accepted.** We will return any original documents as soon as we have processed your application.

### UK residents:

**For Club members who have been at their current address for more than two years and are on the current Electoral Roll,** please include **one** of the following with the member's name and address details clearly displayed:

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

**For Club members who have been at their current address for less than two years,** please include **one** of the following with the member's name and address details clearly displayed:

- Gas, electricity or fixed line telephone bill. Mobile phone and internet utility bills cannot be accepted
- Bank statement. Photocopies and 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 the member's current UK driving licence, or
- Certified copy of the member's 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 the documents must give his/her full name, address and daytime telephone number.**