

Authorised and regulated by the Financial Conduct Authority  
 Member of the London Stock Exchange

**Please sign and return this declaration. You should ensure you have ticked the appropriate boxes to indicate the required service(s), your consent to us holding your data and, if relevant, the Complex Financial Instruments declaration. This document should be signed by all parties to the account(s).**

## TERMS & CONDITIONS OF BUSINESS

Clients name(s):



### CLIENT DECLARATION

I/We confirm that I/we have read and understood these terms and conditions and agree to be bound by them.

The type(s) of service I/we require is (please tick as appropriate):

**Custody Plus**

**Advisory Portfolio Management**

**Discretionary Portfolio Management**

**Execution only (one-off sales/estates)**

I/We also (please tick as appropriate):

**I/We consent to my/our personal data being collected, held, and processed for the purposes described.**

**I/We require a Complex Financial Instruments declaration.**

|         |  |             |  |       |  |
|---------|--|-------------|--|-------|--|
| Signed: |  | Print Name: |  | Date: |  |
| Signed: |  | Print Name: |  | Date: |  |
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