



# Regular Withdrawal Plan Form

## Company, Charity, Pension Trust and Private Trust accounts

### How to fill in this form:

- Use this form to set up, amend or cancel a regular withdrawal plan for your account
- Please use black ink and write clearly inside the boxes provided using capital letters
- Mark your answers with a cross in the appropriate box like this:
- If you make a mistake, please correct it but don't use correction fluid
- The first payment will be made in the month following the receipt of your instruction, as close to the requested payment date as possible. Please keep this in mind when filling out your starting month in section 2
- Allow up to 14 days for confirmation of the set-up, or amendment, of your plan.
- For companies and charities, the name of the bank account must be the same as the account name.

- For pension trusts, the bank account must be held for the pension scheme.
- For private trusts, the bank account can be in the name of the trust itself, one or more of the trustees or specified beneficiaries. Please remember that we can only make payments to trustees and beneficiaries if we have verified their identities.

### What's next?

Please send your completed application form to:

**Fidelity**  
**PO Box 391**  
**Tadworth**  
**KT20 9FU**

## 1 About the account

### Account number

### 1.1 - Name of a trustee for private trust

#### Surname

#### First and other names in full

#### Telephone number

### 1.2 - Name of the company, charity, pension trustee or scheme

### Details for the corporate body or scheme in case of any queries for this instruction

#### Surname

#### First name

#### Telephone number

#### Email address

/03.25/v1.0/

C&T-RegWDPCCTIntP





### 3 Bank details

Any bank details given in this section will override any existing bank details previously provided for this account.

NAME(S) OF ACCOUNT HOLDER(S) – THIRD PARTIES ARE NOT ACCEPTED

BANK/BUILDING SOCIETY ACCOUNT NUMBER

BRANCH SORT CODE

Building Society Collection Account Number (if applicable)\*

\*Building Society accounts – the sort code and building society collection account number can be obtained from your Building Society branch. Please ensure that your Building Society account will accept direct credit payments through the Banks Automated Clearing system. Fidelity does not accept instructions for payments to be made to an account other than the client's own personal account. If the account number and sort code are incorrect, Fidelity will not accept responsibility for any loss incurred by the applicant.

NAME AND ADDRESS OF BANK OR BUILDING SOCIETY

### 4 Intermediary details - to be completed by the adviser (if applicable)


Company stamp

An initial Fee cannot be applied to this type of interaction.

If you wish to set up an Adviser Ongoing Fee or apply other fee types, this must be done online. Instructions hand written on this form will not be actioned.

Unique Adviser Number

Intermediary signature



FCA number

I confirm that I am registered with the FCA to conduct business and my authorisation number is:

Date signed

 (DDMMYYYY)

## 5 Declaration and signature

- I/We understand that the information I/we provide on this application form will be processed in accordance with Fidelity's privacy statement, a link to which is contained in the Fidelity Client Terms or the "Your personal information" section of the Fidelity Adviser Solutions Client Terms (as applicable).
- I/We have read the latest Fidelity Client Terms or the Fidelity Adviser Solutions Client Terms (as applicable)
- I/We I have read the latest Key Features Document, either Doing Business with Fidelity or Doing Business with Fidelity Adviser Solutions (as applicable)
- I/We have read the latest key information document

For Corporate bodies, we need the signatures of two authorised signatories, unless the signatory list states that one is enough. Please provide an up-to-date signatory list with this form.

For trust accounts, we need the signatures of all trustees. Please ensure we have up-to-date information on the trustees.

FIRST CORPORATE BODY SIGNATURE

FIRST CORPORATE BODY PRINT NAME

SECOND CORPORATE BODY SIGNATURE

SECOND CORPORATE BODY PRINT NAME

SIGNATURE OF FIRST TRUSTEE

PRINT NAME

SIGNATURE OF SECOND TRUSTEE

PRINT NAME

SIGNATURE OF THIRD TRUSTEE

PRINT NAME

SIGNATURE OF FOURTH TRUSTEE

PRINT NAME

Date signed

(DDMMYYYY)

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