

Retirement has more potential with

**PRUDENTIAL**

## Prudential ISA Top Up Application Form

### About this form

Please use black ink and write in CAPITAL LETTERS or tick  as appropriate and sign this form.

Please return the completed form together with your cheque or Direct Debit Instruction to:

**Prudential Unit Trusts Limited, PO Box 9022, Chelmsford CM99 2WA.**

- Cheques should be made payable to **Prudential Unit Trusts Limited**.
- We may have to return any application to you that is incorrectly completed.
- This form can only be used to contribute to your existing ISA for the current tax year. Please note that you are required to complete a new Prudential ISA Application Form if one full tax year has elapsed since your last Prudential ISA subscription
- If you have any questions about this form, please call us on **0800 072 6159** between 8am and 6pm Monday to Friday and 9am to 1pm on Saturday. For your security and to improve the quality of our service, we may record and monitor telephone calls.

### Part 1 – Personal details

<p>Title</p> <input type="text"/>	<p>Date of birth (18 or over)</p> <table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px;">D</td> <td style="width: 20px;">D</td> <td style="width: 20px;">M</td> <td style="width: 20px;">M</td> <td style="width: 20px;">Y</td> <td style="width: 20px;">Y</td> <td style="width: 20px;">Y</td> <td style="width: 20px;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y	<p>Permanent Residential Address. Please note we cannot accept a "care of" or business address or PO Box numbers.</p> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <p style="text-align: right;">Postcode</p>
D	D	M	M	Y	Y	Y	Y			
<p>Surname</p> <input style="width: 100%; height: 20px;" type="text"/>	<p>Customer number</p> <input style="width: 100%; height: 20px;" type="text"/>									
<p>Full Forename(s)</p> <input style="width: 100%; height: 20px;" type="text"/>										
<p>Daytime telephone number (including area code)</p> <input style="width: 100%; height: 20px;" type="text"/>										

### Part 2 – Your investment details

The minimum top up into your existing Trust is £250 and £500 into a new Trust. You must remain within the overall ISA investment limits.

**Please refer to your Key Features document for full details of the Trusts and Options available.**

For each Trust in which you invest, please tick either the Growth Option or the Income Option. You can only choose one option per Trust. For Trusts offering both Growth and Income Options, if none/both options are ticked then the Growth Option will be allocated for that Trust. Please note that only the Growth Option is available for some Trusts. If you choose the Income Option please ensure you also complete **Section 3 – Income Payment Details**.

For Trusts that offer both Accumulation Units and Income Reinvested Units, you will receive Accumulation Units in the Trust if you select the Growth Option, unless you are an existing investor who already holds Income Reinvested Units or you specify on your application that you wish to receive Income Reinvested Units.

## Part 2 – Your investment details – continued

I wish to invest	£		in the	Prudential	Trust/Fund
Income Option	<input type="checkbox"/>	Growth Option	<input type="checkbox"/>		

  

I wish to invest	£		in the	Prudential	Trust/Fund
Income Option	<input type="checkbox"/>	Growth Option	<input type="checkbox"/>		

  

I wish to invest	£		in the	Prudential	Trust/Fund
Income Option	<input type="checkbox"/>	Growth Option	<input type="checkbox"/>		

If you need more space to list your choice of Trusts, please use another piece of paper. Please enclose a cheque made payable to **Prudential Unit Trusts Limited**.

### Paying by "Counter Cheque" or Money Order

If you are paying by "counter cheque" or money order from your Bank or Building Society, you must ask your Bank or Building Society to include a reference to the name on your account when they complete the name of the payee on the cheque or money order. For example, if the name on your account is John Brown, they should specify: "PAY...Prudential Unit Trusts Limited – Re: John Brown."

**Please note:** The payment forms part of your application. If the payment instruction is not completed correctly, Prudential may have to return your application and payment instruction. This could mean that the purchase of your investment might be delayed or even rejected. It could also affect the purchase price of your investment.

## Part 3 – Income payment details

Please complete this section if you have selected the Income Option so that income it can be paid direct to your Bank or Building Society account. Please take care when completing this section as Prudential Unit Trusts Limited cannot take responsibility for incorrectly completed Bank or Building Society account details.

The Bank or Building Society account must be in the ISA holder's name.

Bank or Building Society name and address

Postcode

Bank or Building Society account number Branch sort code\*

<input type="text"/>	<input type="text"/>
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Building Society collection account number\*

<input type="text"/>
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Name(s) of account holder(s)

<input type="text"/>
<input type="text"/>

\*The Building Society sort code and collection number can be obtained from your Building Society.

## Part 4 – Details of your regular savings/investment (by Direct Debit)

If you are increasing a monthly Direct Debit payment in this section you should also include details of any existing Direct Debit payments you wish to continue. **This instruction will replace your current Direct Debit arrangements.**

The minimum monthly contribution is £50. The minimum increase for an existing regular savings plan is £5 per month.

**Remember to also complete the Direct Debit Instruction on page 4.** Your regular savings will normally be debited from your Bank or Building Society account on the 10th of each month, or the next business day if this falls on a weekend or public holiday.

Changes must reach us at least 10 working days before the next collection otherwise the change will take place in the following month.

I wish to invest the following monthly amount(s) by Direct Debit starting from

1	0	M	M	Y	Y	Y	Y
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I wish to invest	£		per month in the	Prudential	Trust/Fund
I wish to invest	£		per month in the	Prudential	Trust/Fund

If you need more space to list your choice of Trusts, please use another piece of paper.

## How we use your personal data

For a copy of your Data Protection Notice please refer to your original application form. If you have any questions about this please write to: **Customer Relations, Prudential Unit Trusts Limited, PO Box 9022, Chelmsford CM99 2WA.**

By signing and returning this form, you consent to us processing your data.

### Part 5 – Declaration

Please read this Declaration carefully, then sign and date.

I have received and read a recent version of the Key Features.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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**Important note:** We cannot accept your application form without your signature within this Declaration.

### Financial Adviser details

Name

Regulator

Regulator number

Company name

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Postcode

Agent code

For FSA product sales data purposes: If you did not provide advice on this sale, please tick this box.

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# The Direct Debit Guarantee

Please return this part of the form with completed application



**Instruction to your bank to pay Direct Debits**

To be completed if you have ticked the monthly investment option.

Please complete parts 1 – 6 to instruct your branch to make payments from your account. Sign and then return the form to: Prudential Unit Trusts Limited, PO Box 9022, Chelmsford CM99 2WA.

1. Name and full postal address of your Bank or Building Society

To: The Manager	Bank or Building Society
Address	
Postcode	

2. Name(s) of account holder(s)


3. Branch sort code (from top right hand corner of your cheque)

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4. Bank or Building Society account number

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Originator's Identification Number

7	2	4	7	5	0
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5. Prudential customer number (existing investors)

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6. Instructions to your Bank or Building Society

Please pay **Prudential** Direct Debits from the account detailed on this Instruction, subject to the safeguards assured by The Direct Debit Guarantee.

**I understand that this Instruction may remain with the Originator mentioned above and if so, details will be passed electronically to my Bank/ Building Society.**

Signature

X
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Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Signature

X
---

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

**Banks and Building Societies may not accept Direct Debit Instructions from some types of account.**

[www.pru.co.uk](http://www.pru.co.uk)

"Prudential" is a trading name of Prudential Unit Trusts Limited and Prudential Personal Equity Plans Limited. This name is also used by other companies within the Prudential Group, which between them provide a range of financial products including life assurance, pensions, savings and investment products. Prudential Unit Trusts Limited and Prudential Personal Equity Plans Limited are registered in England and Wales under numbers 1796126 and 2059989 respectively. Registered Office at Laurence Pountney Hill, London EC4R 0HH. Authorised and regulated by the Financial Services Authority.

Please tear off and keep this part of the form

**The Direct Debit Guarantee**



- ▶ This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society.
- ▶ If the amounts to be paid or the payment dates change, Prudential will notify you 10 working days in advance of your account being debited or as otherwise agreed.
- ▶ If an error is made by us or your Bank/Building Society, you are guaranteed full and immediate refund from your branch of the amount paid.
- ▶ You can cancel a Direct Debit at any time, by writing to your Bank or Building Society. Please also send a copy of your letter to us.