

1. Completing Your Application

Tick

Please ensure that you have completed each part of this application form. Insert your full name, email address and telephone on the following page before signing and dating the form.

2. Confirming Your Identity

We require two proofs of identity - one proof of your home address and one photographic proof of identity. This is in order to comply with current Anti-Money Laundering Regulations. Acceptable forms of the two are:

Proof of Identity

- A copy of your current passport
- A copy of your photo driving licence

Proof of Address

- Your current and valid UK driving licence (paper-style UK provisional licences are not acceptable). Note that this cannot be used as evidence of both Identification and Address
- A utility bill, i.e. gas, electricity, water or telephone bill (not including mobile phone bills)
- Your most recent bank, building society or credit card statement
- Your local authority tax bill for the current year.

Note that any bills or statements used as proof should not be dated any earlier than 3 months before the date of your application.

3. Payment

We accept payment of your investment via cheque, banker's draft or bank transfer. Any payment must specifically mention the name(s) of the investor(s). Please specify how you wish to complete your payment:

Cheque or banker's draft

Bank transfer

The arrangement fee for non-advised investments is 0.5% per investment plan, with a minimum of £75. If you are investing into multiple plans then these will be administrated separately, and will each require their own fee.

Please note that investments should not be made payable to Best Price Financial Services - see the product application form for whom your investment should be made payable to. Deadlines for application may vary depending on your chosen method of payment - please see the product application form for more details.

4. Post all forms to:

Best Price Financial Services, The Tythe Barn, 5 Eglwys Nunydd, Margam, Neath Port Talbot, SA13 2PS.

5. Where did you hear about Best Price Financial Services?

Recommendation Newspaper Story Advertisement Search Engine

Facebook Twitter E-mail Other

6. I would you like to be kept up to date with new product launches via email? Yes No

1. Client name: _____ Telephone No: _____
 Email address: _____ Investment amount: _____
 Product name: _____

2. Questions

	Yes	No
• Have you received any advice from Best Price Financial Services which has helped you choose this investment?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you aware that most Structured Investment products do not have FSCS coverage, meaning that your original capital is at risk to failure of the relevant counterparty?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you aware that any growth or income produced by this investment is ultimately linked to the performance of the underlying index, equities, or basket of commodities?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you aware that, as with all Structured Products, if the relevant index or indices fall to below the pre-determined safety levels you may lose some or all of your investment?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you aware that there is no direct investment in the shares of the index or indices relevant to the plan, and the plan will not receive dividends from the participating companies? This means that the returns of the plan could be lower than if you invested directly in the individual shares of the indices.	<input type="checkbox"/>	<input type="checkbox"/>
• Are you aware that the tax position on maturity might not be advantageous to you at the time?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you aware that if you redeem your investment before the end of the Plan Term, you may get back less than the amount you originally invested?	<input type="checkbox"/>	<input type="checkbox"/>

3. Past Investment Experience

Have you invested in Structured Products before? Y N

If so, how much were you charged for this service? _____

Who did you arrange this investment with? _____

Would you be interested in a free initial consultation from our advisory branch Best Price Advice? Y N

4. Declaration

	Yes	No
• I have carefully read the Plan brochure, including any applicable Terms and Conditions for the Plan, and accept the terms under which the Plan will be managed.	<input type="checkbox"/>	<input type="checkbox"/>
• I have carefully read the Key Information Document, and fully understand the risks, costs, potential gains and losses of this product.	<input type="checkbox"/>	<input type="checkbox"/>
• I understand that Best Price Financial Services does not provide investment advice or assess the suitability of this product, and that I therefore take full responsibility in proceeding with this product.	<input type="checkbox"/>	<input type="checkbox"/>
• Our arrangement fee is 0.5% of the total investment (minimum £75).		

Please state your chosen method of payment:

- As a separate cheque made payable to Best Price Financial Services Ltd.
- As a fee deducted from your initial investment. (please see application)

By signing below you are acknowledging that you have read and understood the above and that you are instructing Best Price Financial Services to arrange the above investment on your behalf.

Name: _____

Name: _____

Signature: _____

Signature: _____

Date: _____

Date: _____