



Open Pension - Form C Initial Investment Instruction

Full Name

Member Number

For property, loans, unregulated investments or unquoted share purchases, please complete the associated application form available from our website or on request.

How would you like us to purchase your initial investments?

- L&C default execution only stockbroker *(terms & conditions and a dealing charge will apply)*
- Your stockbroker - Please provide contact details below:
- An investment platform such as Cofunds / Skandia *(please indicate which platform below)*
- Directly with the Fund providers or Unit Trust / OEIC companies. *

** If you select this option, then please let us have the application forms for the specific funds you have selected. Please only complete the fund information on the forms and arrange for your Professional Adviser to complete their details in the relevant section. Please ensure you leave the account holder and address details blank as we will purchase and hold these investments on your behalf.*

Amount to be invested

Please either enter the individual amounts below or if you have entered % amounts below then let us know the total monetary amount you wish us to invest: £

Fund / asset to be purchased	% / £
1	
2	
3	
4	
5	
6	
7	
8	
	Total:

Trustee cash deposits

Unless you instruct us otherwise we will hold all cash received in a designated account with the scheme bankers. We are happy to place your funds on deposit with other institutions as an investment and would ask that you let us have the contact details of the institution and the basis and amount of the deposit. Banks often have different types of accounts and we would ask that you be specific. Please note we apply an annual administration fee for each account not held with our nominated scheme bankers. Please see our fee basis for further details.

Bank name	<input type="text"/>	Deposit Amount	£ <input type="text"/>
Bank address	<input type="text"/>	Bank contact name	<input type="text"/>
	<input type="text"/>	Bank telephone no.	<input type="text"/>
	<input type="text"/>	Interest rate	<input type="text"/>
	<input type="text"/>	Term of deposit	<input type="text"/>
Signed	<input type="text"/>	Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>