



# Regular Investment Instruction



Please complete this instruction if you wish to set up or amend an existing regular investment instruction linked to a Direct Debit.

This form should not be used for setting up or amending a standalone recurring switch – the "Recurring Switch Instruction" form should be used for this purpose.

Please note that if the Investor currently has a Regular Investment into their default selection, this will now be amended to reflect their new default.

Novia will accept the receipt of this form without a signature, **provided it is submitted through the Adviser Zone secure email service**. If you choose to sign the completed form please arrange for the original to be returned to Novia.

If you need assistance completing this form please contact the Client Services Team on 0345 680 8000.

## Investor Details

Novia Investor Number

Investor name(s)

## Regular Investment Instruction

Please apply this instruction to (e.g.GIA)  Number

And the collection of £  Commencing with effect from\*

\*this instruction must be received by us 5 business days before the Direct Debit collection date. If no commencement date is entered, we will commence this instruction from the next available collection.

### Option 1 Investment Model

Please invest the amount detailed in Section 2 into the following model (please ensure the full model name is quoted):

**Please note, the model needs to be linked to the specific wrapper via MPM.**

### Option 2 Specified Funds

ISIN/Sedol	Name of investment	Inc/Acc	%
	Cash		2%
<b>Total**</b>			100%

\*\*the total for all the named investments must be the same as the overall switch amount stated for Option 2. Please note that the total must add up to 100%. You must invest a minimum of 2% cash.

**Adviser Declaration (This section must be completed regardless of submission method)**

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Novia will accept the receipt of this form without a signature, **provided it is submitted through the Adviser Zone secure email service.** If you choose to sign the completed form please arrange for the original to be returned to Novia. By submitting this form you are confirming the following:

- / I declare that the information in this form is true and correct to the best of my knowledge.
- / I agree to indemnify Novia Financial Plc against all such claims or losses, including additional tax charges and fines, in the event that the information provided proves to be incorrect.
- / I understand that checks may be performed on this instruction to confirm details are correct.
- / I confirm that I have the Investor's authority to submit this instruction on their behalf.
- / I/We understand, if applicable, this will replace any existing instructions.

I understand that failure to provide all of the necessary information may lead to delays in setting up this instruction.

Name	<input type="text"/>	
Position	<input type="text"/>	
Firm name	<input type="text"/>	
Firm FCA number	<input type="text"/>	
Adviser Signature	<input type="text" value="If you are submitting by post, you must sign here."/>	Date <input type="text"/>