

FREEDOM ISA 'TOP-UP' FORM

Use this form to make an additional subscription to your Avalon Freedom ISA account.

If you have not subscribed to your Avalon Freedom ISA in the current or previous tax year, we will require a full application form completed.

Account holder:

Client Reference Number:

Additional sum:

Our top-up minimum is £500 (£100 per fund)

If you want the additional sum to be allocated to your existing investment selections please leave the next section blank and sign the declaration below. Please indicate below any new investments for the top up amount and their proportions.

	Fund name (in capitals)	% of top-up to be invested in this fund
1	<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
2	<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
3	<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
4	<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
5	<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
Total should be 100%		<input style="width: 50px;" type="text" value="100%"/>

- Declaration:**
1. All subscriptions made and to be made, belong to me.
 2. I will inform Avalon Investment Services Limited promptly of any changes in my personal details as shown on this document.
 3. I am resident and ordinarily resident in the UK for tax purposes or, if not so resident perform duties which, by virtue of Section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the UK, or I am married to, or in a civil partnership with, a person who performs such duties and I will inform Avalon Investment Services Ltd if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
 4. I understand that my identity will be verified for anti money laundering purposes. This may include obtaining information about me from a credit reference agency and this information will only be used for verification of my identity.

Signature:

Date:

Please don't forget to enclose your personal cheque made payable to Avalon client money account. Where you are investing money using a banker's draft or building society cheque please ensure your name is clearly shown on the cheque. Return your fully completed form and payment to Avalon Investment Services Ltd., 2 Market Place, Tetbury, Glos, GL8 8DA.