

Please complete this form to setup a Regular Savings Instruction. Once complete, please return this form to the Novia Global client services team via email on clientservices@novia-global.com.

PLEASE COMPLETE THIS FORM IN CAPITALS USING BLACK INK. ALL FIELDS ARE MANDATORY.

1 Client Details

Client ID	<input type="text"/>
Client Name (s)	<input type="text"/>
Investment Amount	<input type="text"/>
Initial Intermediary Charge	<input type="text"/>

2 Regular Savings Instruction

Please apply a regular switch to (e.g. GIA GBP)

For any switch instruction made on this application please write the names in full as listed on the Novia Global Investments List.

The Investments List and fact sheets can be found at www.novia-global.com

Please note that any existing rebalancing instruction is not affected by this instruction.

Investment Instruction

This instruction will only be applied to cleared funds within the Cash Facility and will commence in line with the start of the regular investment contribution.

I understand that in the event of the Cash Facility falling below 2% of the value of the client's currency account, automated processes may mean that assets purchased via this recurring switch are sold to top-up the cash holding to the required level.

Please note, we are unable to set up a Regular Switch in line with a model portfolio.

Name of investment	ISIN	Inc/Acc	%
Cash (minimum 2%)	Not applicable		

*Please note that a Regular Savings Instruction are processed at the end of each month and must be received during the month prior to their commencement.

3 Intermediary Authority

I confirm this instruction is provided with the authority of the client.

Intermediary Signature	<input type="text"/>	Date	<input type="text"/>
Intermediary Name	<input type="text"/>		