

Appointment of financial adviser

This form is used to remove any standing arrangement you may have with an existing financial adviser and appoint a new financial adviser to service your portfolio(s).

I/We formally advise Ardan International Limited of my/our decision to appoint the following company as financial adviser to the specified portfolio(s). This instruction replaces any previous instructions.

Please note if the portfolio management fees are to be updated, a new Ardan Pricing Schedule needs to be completed which can be obtained from your newly appointed financial adviser.

Please ensure you complete all sections below:

Portfolio reference(s)	<input type="text"/>
Client(s) name	<input type="text"/>
Client(s) address and postcode	<input type="text"/>
Client(s) email address	<input type="text"/>
Adviser company	<input type="text"/>
Adviser name	<input type="text"/>
Company address and postcode	<input type="text"/>
Postcode	<input type="text"/>
Adviser email address	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Signatures of all portfolio owner(s)/trustees

Full name	<input type="text"/>	<input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Full name	<input type="text"/>	<input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Important notes

When your new financial adviser has been appointed, we will write to your previous financial adviser to advise that they have been removed and no longer have authority to receive information regarding your portfolio.

Privacy policy

Our full privacy policy can be viewed at <https://www.ardan-international.com/privacy> or can be obtained by requesting a copy from our Data Protection Officer.

If you need any assistance filling in the appointment of financial adviser form, please contact our customer support team on: +44 (0)1624 638800.

Please return a scanned copy of this to servicing@ardan-international.com