



McInroy & Wood Portfolios

Top up Form (Non ISA)

A – Personal details (please use BLOCK CAPITALS)

Client Reference number

APPLICANT

Title Surname/Company Name

Forename(s)

Permanent residential address

Postcode

Daytime telephone number

Email Address

B – Please select the Fund(s) you wish to top up:

Fund Name	SEDOL (for office use)	Lump Sum Amount (minimum £1,000 per fund)	Monthly Saving Amount (minimum £100 per fund)
MW Balanced Fund Personal Class	B7RRJ16	£	£
MW Income Fund Personal Class	B8KQRW4	£	£
MW Smaller Companies Fund Personal Class	B8NC4D9	£	£
MW Emerging Markets Fund Personal Class	B7SKS40	£	£
TOTAL		£	£

For lump sum contributions:

I enclose a personal cheque for £ made payable to “McInroy & Wood Portfolios Ltd”

I will instruct an electronic bank transfer for £ . If you prefer to settle electronically, please wait for the transaction confirmation letter, which we will send to you immediately following investment, and then ensure that you transfer the amount due to our bank account by the date shown, quoting your transaction reference number. All the information you need will be noted in the letter.

For regular monthly contributions:

I enclose a completed Direct Debit Instruction Form. (please tick to confirm enclosed)

Continued overleaf.../

C – Gifting

If someone else is purchasing units by cheque for you, in your name as a gift, they must complete this section with their details.

Full Name

Address

Postcode

Date of Birth

D	D	M	M	Y	Y	Y	Y
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Signature

Date

D	D	M	M	Y	Y	Y	Y
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D – Declaration Section

1. I have read a current copy of the Key Investor Information Document(s) of the Fund(s) in which I wish to invest and confirm that I am familiar with the features of the Fund(s) as described in the Key Investor Information Document(s).
 2. I acknowledge that I am being considered as an execution-only client by McInroy & Wood Portfolios Limited, and confirm that I have received no advice from that company or any of its associates or representatives regarding the merits or suitability of this investment.
 3. I declare that the information provided in this form is, to the best of my knowledge and belief, accurate and complete.
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E – Signature of Applicant

(1) Signature

Date

D	D	M	M	Y	Y	Y	Y
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Please post the completed form to us at:

McInroy & Wood Portfolios Ltd,
PO Box 12177,
Chelmsford,
CM99 2EA

McInroy & Wood Portfolios Ltd, PO Box 12177, Chelmsford, CM99 2EA, UK

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