

CAF INVESTMENT ACCOUNT

Portfolio designations

For office use only:

CAF Unique ID

CRM Number

Before you start

Please ensure you complete each section clearly, in full and in BLOCK CAPITALS using black ink. This form should be used in the event that you wish to add portfolio designations to your organisation's CAF Investment Account. If you need guidance to help you complete this form, please contact us using the details given on the back of this form.

The same roles and permissions for your CAF Investment Account will apply to all portfolio designations and cannot be amended.

Section 1

Organisation details

1.1 Organisation name (legal name)

1.2 CAF Investment Account client reference

Section 2

Portfolio designations

If you need more than ten portfolio designations please continue on a separate sheet.

Portfolio designation one

Portfolio designation two

Portfolio designation three

Portfolio designation four

Portfolio designation five

Portfolio designation six

Portfolio designation seven

Portfolio designation eight

Portfolio designation nine

Portfolio designation ten

Section 3 Authorisation

We will confirm to the Primary Contact by email once your portfolio designations have been added. You will then be able to fund your portfolio using the reference provided.

This form needs to be signed by two authorised signatories for this CAF Investment Account.

If you need guidance to help you complete this form please contact us using the details below.

Confirmed and authorised by two authorised signatories.

Authorised Signatory 1

Full name

Job title / position

Signature

Date D D M M Y Y Y Y

Authorised Signatory 2

Full name

Job title / position

Signature

Date D D M M Y Y Y Y

Next steps

Please take a copy of this signed form for your records and return to CAF Financial Solutions Limited at the address below. Once received, all original forms and documents relating to this service will be scanned, unaltered, electronically stored and the original destroyed in accordance with our Data Retention Policy in place from time to time.

Saving and Investment team
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The CAF Investment Account is operated by Winterflood Business Services. Winterflood Business Services is a registered trading name of Winterflood Securities Limited, registered in England No. 02242204. Registered Office: The Atrium Building, Cannon Bridge House, 25 Dowgate Hill, London EC4R 2GA. Member of the London Stock Exchange and NEX Exchange. Authorised and regulated by the Financial Conduct Authority (FCA register number 141455).

CAF Financial Solutions Limited (CFSL) is authorised and regulated by the Financial Conduct Authority under registration number 189450. Authorisation can be checked on the financial services register at www.fca.org.uk CFSL Registered office is 25 Kings Hill Avenue, Kings Hill, West Malling, Kent ME19 4TA. Registered under number 2771873. CFSL is a subsidiary of Charities Aid Foundation (registered charity number 268369).

Telephone calls may be monitored or recorded for security/training purposes. Lines are open Monday to Friday 9am - 5pm (excluding English bank holidays).