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

Portfolio designation one

Portfolio designation two

Portfolio designation three

Portfolio designation four

Portfolio designation five

Portfolio designation six

Portfolio designation seven

If you need more than ten portfolio designations please continue on a separate sheet.
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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Telephone calls may be monitored or recorded for security/training purposes. Lines are open Monday to Friday 9am - 5pm (excluding English bank holidays).