

Change of Agency - Isle of Man

Change of Agency Request Form



Please Note: This form has been optimised for digital use to avoid as much paper waste as possible. Please download and save this file locally on your device that you are using and open with Adobe Acrobat.

You do not need a paid account, but you may need to configure your digital ID for signing (please follow the 'on screen' steps when using Adobe Acrobat for full details on how to do this).

Once complete, please send this form to clientservices@capital-iom.com

1 Customer Details

Name:

Portfolio Number:

2 New Advisor/Agency Details

I hereby appoint the below noted intermediary to assist in managing my portfolio:

CIG Intermediary Number:

Company:

Advisor Name:

3 New Advisor/Agency Permissions

I authorise the above noted advisor/agency to have the following permissions in relation to my portfolio:

☐ View online portfolios / obtain new information

☐ Submit dealing instructions

NOTE: Capital International is required to hold on file up to date certified ID/Verification of Address (VOA) for any party to whom dealing rights are granted. Dealing permissions are only granted to intermediaries deemed to satisfy Capital International's eligibility criteria.

☐ Submit withdrawal requests

NOTE: Withdrawals will only ever be made to the customers own bank details held on file in relation to their portfolio, this permission applies to the requesting of withdrawals only.

4 Agreed Fees for Advisor/Agency

Are there any changes to the current charges/commission structure on the portfolio? ☐ YES ☐ NO

If YES, please provide the relevant tariff sheet in conjunction with this form. If you do not have access to the applicable tariff sheet, please contact the Platform Team to obtain a copy: platform@capital-iom.com

5 Signatures

Portfolio Holder / Authorised Signatory:

Name:

Signatory:

Date: (dd/mm/yyyy)

Portfolio Holder / Authorised Signatory:

Name:

Signatory:

Date: (dd/mm/yyyy)

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