

Prudential ISA

# Adding to or Changing Your Investment Amount Form

## About this form

- Please complete all relevant sections in blue or black ink, write in CAPITAL LETTERS or tick  as appropriate and sign this form on the reverse.
- **Before you sign this form:** you should read the latest versions of the Key Features Document and Key Information Document and Prudential ISA costs and charges disclosure as applicable, for your chosen PruFund Fund in which you want to invest, and the ISA Terms and Conditions which includes the Link Financial Investments Limited Customer Agreement.
- If you have any questions or would like an up-to-date copy of the ISA Terms and Conditions please call us on **0344 335 8969** between 8:30am and 5:30pm Monday to Friday.
- Please return the completed form to **Link Financial Investments Limited, PO Box 384, Darlington DL1 9RZ.**
- We may have to return any application that is incorrectly completed. This could mean that the purchase of your investment may be delayed or even rejected. It could also affect the purchase price of your investment.
- You can use this form at any time to: (i) make an additional payment to your existing Prudential ISA.  
(ii) change the amount you pay by Direct Debit (in multiples of £5).
- Please note that you may only invest in an ISA if you are eligible.

## Part 1 – Investor details

Full Name

Your Link customer number

Address

Postcode

## Part 2 – Making an additional payment to your existing Prudential ISA (single premium)

The minimum top up into your existing fund(s) is £250 or £500 into a new fund.

Please refer to the ISA Terms and Conditions and relevant KIID(s) for full details of the fund(s) and options available.

Fund name

Amount

Prudential PruFund Risk Managed 1

Prudential PruFund Risk Managed 2

Prudential PruFund Risk Managed 3

Prudential PruFund Risk Managed 4

### Part 3 – Changing the amount you pay by Regular Investments

Direct Debit payments are taken on the sixth of each month or the next business day. Changes must reach us at least ten calendar days before the next collection otherwise the change will take place in the following month.

If you wish to change your bank or building society account please contact us on **0344 335 8969**.

I wish to amend my regular savings contributions starting from

0	6	M	M	Y	Y	Y	Y
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from	£		to	£		per month in the	Prudential PruFund Risk Managed 1
from	£		to	£		per month in the	Prudential PruFund Risk Managed 2
from	£		to	£		per month in the	Prudential PruFund Risk Managed 3
from	£		to	£		per month in the	Prudential PruFund Risk Managed 4

### How we use your personal data

For a copy of your Data Protection Notice please refer to your original application form. If you have any questions about this please write to: **LFI Investor Services, PO Box 385, Darlington DL1 9UA**.

By signing and returning this form, you consent to us processing your data.

### Part 4 – Declaration and authorisation

You must sign exactly as your account is registered before we can proceed with your instructions.

I have received, read and understood or had satisfactorily explained the latest versions of the ISA Terms and Conditions and Key Features Document and Key Information Document and Prudential ISA costs and charges disclosure. I am aware that the other PruFund Funds' Literature is available free of charge and I confirm that I have accessed them to the extent I believe necessary. If you change your personal details and instruct a withdrawal, settlement proceeds may be withheld pending completion of our security procedures.

The IDD requires a client's "demands and needs" to be assessed prior to the conclusion of a life policy. As the policy has already been concluded, LFI has not re-assessed your demands and needs. Nor has LFI assessed the suitability or the appropriateness of an investment into a PruFund Fund for you or the services that we provide to you. You hereby confirm your understanding and agreement to that position.

Should you wish to re-assess your demands and needs against the PruFund Funds or the suitability of those funds or the services we provide, then you should consult a professional adviser.

I declare that I am the beneficial owner of this investment.

I am not resident in the USA and agree to notify Link Financial Investments Ltd immediately in the event that I become resident in the USA.

Holder signature	<input type="text"/>	Date	D	D	M	M	Y	Y	Y	Y
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**Please note:** If you have not invested in this or the previous tax year, then you are required to complete a new ISA Declaration Form found in the ISA Application Form.