

To save time and paper, why not apply online? Visit www.octopuschoice.com with your financial adviser to get started

Before completing this application form, make sure you have read and fully understand...

- Our risk statement: www.octopuschoice.com/risks
- Our terms & conditions: www.octopuschoice.com/terms

Scan and return your completed form to:

support@octopuschoice.com

If paying by cheque, please post it to:

Octopus Choice, 8th Floor,
33 Holborn, London, EC1N 2HT

About you

Title First name Last name

Email address (if you have one)

Address line 1

Address line 2

Town or city Postcode

Date of birth Country of birth

Country(ies) of citizenship

If you are not a British citizen, please enter your passport number

If you are applying for an ISA, please enter your National Insurance number

Are you an existing Octopus Choice investor?

Are you applying through a registered Power of Attorney? If yes, who would you like us to communicate with? **Me, the investor** **Them, the attorney**

Attorney's first name Attorney's last name

Attorney's address line 1

Attorney's address line 2

Attorney's town or city Attorney's postcode

Attorney's date of birth

Note: if you're acting as Attorney, please include a copy of the POA document, certified on every page by a registered individual (for example a solicitor, accountant or financial adviser).

Your investment into a regular Octopus Choice account (non-ISA)

Amount to invest

£

Reinvest your interest?

Y

N

Please confirm any up-front or ongoing charges you have agreed to pay your financial adviser:

If you select 'no', we'll pay interest into your bank account each month – and so will need you to provide your bank details. The account must be held in your name.

Up-front charge

%

Ongoing charge

%

Account number

Sort code

Your investment into an Octopus Choice ISA (max £20,000)

Amount to invest

£

Reinvest your interest?

Y

N

Fund from existing Octopus Choice account?

Y

N

Please confirm any up-front or ongoing charges you have agreed to pay your financial adviser (these can be different to your regular account):

If you select 'no', we'll pay interest into your bank account each month – and so will need you to provide your bank details. The account **must** be held in your name.

Up-front charge

%

Ongoing charge

%

Account number

Sort code

Note: The ISA allowance for the current (2017/18) tax year is £20,000. We don't currently accept transfers of existing ISAs.

How will you be funding your account?

Note: if opening an ISA account, you can choose to fund it from an existing Octopus Choice account (see above).

Bank transfer: the faster choice!

You'll be set up quicker if you fund your account by bank transfer. Please scan and email your completed form to support@octopuschoice.com. We'll then get back in touch with a unique reference when we're ready for you to transfer the investment amount. Our bank details, for your records:

Account number 83669009

Sort code 40-03-28

You'll need to make the payment from your personal account, not a business or third party's (including your spouse's).

Cheque: send along with your application

Please make the cheque for the deposit amount payable to '**Octopus Choice**'. Then post – with your completed application form – to Octopus Choice, 8th Floor, 33 Holborn, London, EC1N 2HT.

Make sure you:

- Send the cheque from your personal account, not a business or third party's (including your spouse's).
- Reference your name if sending a banker's draft or building society cheque. **If the cheque is to fund an ISA account, please write 'ISA' clearly on the back of the cheque.**
- **Don't** make the cheque payable to Octopus Investments, as we will have to return it to you.

Investor declaration

Please tick to confirm...

I agree to the investment and charges outlined on the previous page, and have read and accept the terms and conditions and risk statement.

I confirm that I have no overseas tax obligations.

Signature

D D M M Y Y

If you do pay tax elsewhere, please enter the relevant countries below, along with your personal taxpayer identification numbers for each:

Country	Taxpayer identification number
Country	Taxpayer identification number

ISA declaration (if opening an ISA account)

Please read and confirm the following declaration...

- I'm 18 or over.
- I haven't exceeded the annual ISA limit (£20,000 for 2017/18) across a cash ISA, a stocks and shares ISA, an innovative finance ISA and a lifetime ISA – and won't over the course of the tax year.
- All ISA investments that I've made, and am going to make, belong to me.
- I'm a resident in the UK for tax purposes, or am otherwise eligible for an ISA under UK tax law, or am married to/in a civil partnership with someone who is.
- I'll inform Octopus Choice if my situation changes and I'm no longer eligible for an ISA.
- I haven't subscribed, and won't subscribe, to another innovative finance ISA in the same tax year that I subscribe to this innovative finance ISA.
- I acknowledge that transferring funds from my existing Octopus Choice account may change the rate I earn, and the number of loans I am invested in.

I confirm all of the above.

Signature

D D M M Y Y

The section below should be completed by your financial adviser or intermediary

Adviser/intermediary details

Is this an execution only case?

Y N

If yes, please send an invoice to
labsinvoices@octopusinvestments.com

Title First name Last name

Email address

Company name Company postcode

Company FCA number Personal FCA number

Bank account number Sort code

We'll send your adviser charges here. If your client isn't paying you adviser charges, you can leave these fields blank.