

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

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

Before completing this application form, make sure you read:
Our risk statement: www.octopuschoice.com/risks
Our terms & conditions: www.octopuschoice.com/terms

! PLEASE COMPLETE THIS FORM USING CAPITAL LETTERS AND A BLACK PEN

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

Passport number (if you're a non-British citizen)	National Insurance number (if applying for ISA)	Are you an existing Octopus Choice investor?
		Y N

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).

Are you applying through a registered Power of Attorney? Y N

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 postcode	Attorney's town or city	Attorney's date of birth

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

Amount to invest

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

Up-front charge

Ongoing charge

Reinvest your interest?

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.

Account number

Sort code

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

Amount to invest

Fund from existing

Octopus Choice account?

Reinvest your interest?

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.

Tax year applying for

Account number

Sort code

Note: The ISA allowance for the current (2017/18) tax year is £20,000.

By signing the ISA declaration, I confirm I am applying to subscribe for an innovative finance ISA for the tax year stated above, and each successive year in which I make a subscription until further notice.

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

Up-front charge

Ongoing charge

Note: Once you have set up an ISA account using this form, you will be able to transfer existing ISAs across, too. Your adviser will be able to help you with this.

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

Note: Cheques take seven days to clear, so we recommend using the bank transfer option.

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

Signature

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

D	D	M	M	Y	Y	Y	Y

I confirm that I have no overseas tax obligations.

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

Country

Taxpayer identification number

TIN not available

ISA declaration (if opening an ISA account)

Please read and sign to confirm the following ISA declaration...

IMPORTANT: Make sure you also complete and sign the Investor Declaration above.

- I'm 18 or over.
- I apply to subscribe for an innovative finance ISA for this tax year and each successive year in which I make a subscription until further notice.
- I have not subscribed/made a payment and will not subscribe/make a payment more than the overall subscription limit in total to any combination of permitted ISA types in the same tax year.
- 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.
- 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.
- I'll inform Octopus Choice if my situation changes and I'm no longer eligible for an 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 agree to the ISA terms and conditions and the charges outlined on the previous page.

I authorise Octopus Co-Lend Limited to...

- Hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
- Make on my behalf any claims to relief from tax in respect of ISA investment.

Signature

By signing I confirm all of the above and declare that this application form has been completed to the best of my knowledge and belief.

D	D	M	M	Y	Y	Y	Y

Adviser/intermediary details (completed by your financial adviser or intermediary)

Title

First name

Last name

Company name

Email address (if you have one)

Company postcode

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

Company FCA number

Bank account number

Sort code

 - -

Personal FCA number

If this an execution application only send an invoice to labsinvoices@octopusinvestments.com.