

Unicorn AIM IHT & ISA Portfolio Service

ADVISER PAYMENT AMENDMENT FORM

Important Information

This form is required if you wish to modify existing adviser payment instructions to your account.

We recommend that you seek independent investment and tax advice before making decisions relating to our products.

WM Capital Management Ltd is authorised and regulated by the Financial Conduct Authority and recorded in the Register under reference no 601025.

This form can be filled digitally and submitted to unicorn-aim-ihl@wmcapitalmanagement.com or it can be printed, completed and returned to Unicorn AIM IHT & ISA Administration Centre, WM Capital Management, 8 Thorpe Road, Norwich, NR1 1RY.

Adviser Payment Amendment Form

Policy Details

Client Name/s:

Account Number:

Adviser Name:

Adviser Firm:

Complete this section to modify existing adviser payment instructions to your account.

Modify Existing Payment

Adviser Ongoing Fee

% of the value of your Portfolio and paid on a monthly basis.

One-off Adviser Fee

Fixed amount of £

Authorisation

Client Name/s

I/we instruct you to make Adviser Payments as indicated above

Client / Attorney Signature/s

Date Signed