

Account Name (Registrant(s), Trust, Company or Pension Scheme)

Registrant(s) Details (or Trustee(s)/Director(s))

Surname _____	Surname _____	Surname _____
Forename(s) _____	Forename(s) _____	Forename(s) _____
Date of Birth _____	Date of Birth _____	Date of Birth _____
NI Number _____	NI Number _____	NI Number _____
Correspondence address _____	Copy Correspondence address (if applicable) _____	
_____ Postcode _____	_____ Postcode _____	
Telephone _____	Telephone _____	
Email _____	Email _____	

Bank Account Details

Account name _____ Sort Code - - Account No.

Account Type

I wish to open: A Standard Account A Managed Account

You will need to complete additional agreements in order to activate one of our Managed Services

Cave & Sons' Nominee Platform

I/We have elected to have investments held on Cave & Sons' Nominee Platform. I/We confirm that I/we have received the Cave & Sons' Nominee Platform Brochure and have read and understood the Terms and Conditions relating to the service in full.

Income distribution

With regard to income payable on my/our account I/we request the following:

- Dividends are to be paid to my/our account at Cave & Sons and held on deposit
 Dividends are to be paid by BACS to my/our Bank Account on a monthly quarterly or half yearly basis

Scrip dividends

In some instances it is possible to take additional shares in lieu of dividends. Please select preferred option.

- I/We wish to receive additional shares in lieu of dividend payments where available
 I/We would like to take cash dividends in all instances

Tax services

- Please provide a Consolidated Income Tax Voucher after the end of each tax year*
 Please provide a Capital Gains Tax report after the end of each tax year*

* Please refer to the Cave & Sons Nominee Platform Brochure for current charges

Account Password

For security reasons we would be grateful if you could provide an account password and password prompt

Password: Password Prompt:

(We use the password prompt to help you to remember your password in the event that it is forgotten)

Authorities I/We give my/our authority for the following to be given information relating to my/our account:

I/We confirm receipt of Cave & Sons' Terms of Business Letter and Client Agreement (version ____).
 I/We confirm that I/we have been given at least 24 hours in which to consider my/our acceptance of it.
 I/We understand that Cave & Sons reserve the right to undertake a credit check and I/we give consent for this.
 I/We confirm we have been made aware of Cave & Sons' Privacy Notice and understand the nature of my/our personal data being collected and processed
 I/We consent to Cave & Sons providing me/us with updates and details of investment opportunities, or with articles of information, by
 Phone Email Post Text

Signature: _____	Signature: _____	Signature: _____
Print name: _____	Print name: _____	Print name: _____
Date: _____	Date: _____	Date: _____

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Cave & Sons is authorised and regulated by the Financial Conduct Authority. FCA Number 143715.
 Member of the London Stock Exchange and The Personal Investment Management and Financial Advice Association (PIMFA).



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