FINANCIAL DISCOUNTS DIRECT

Premier Club Membership Application

Please complete all sections of this form and list the investments you wish to consider moving onto the Cofunds platform. You do not need to include those funds already held with Cofunds. Please use block capitals

Personal Details

Full name of unitholder		Title	
Date of Birth			
Current address			
Postcode			
No. of years at this address		National Insurance No.	

ISA/PEP Investments

Plan Manager	Fund Name	Account number or reference	PEP, Maxi or Mini ISA	Unit type ACC/INC	Tick if current year
Example Plan Manager	Example Growth Fund	123456789	Maxi	ACC	

Unit Trust/OEIC Funds outside a PEP or ISA wrapper

Fund Manager	Fund Name	Account number or reference	Designation (if any)	Unit type ACC/INC	No. of units
Example Fund Manager	Example Growth Fund	123456789		ACC	ALL