Before you Submit
Use these requirements when submitting an instruction to invest into a **new unitholder account**.

Important:
Additional documentation may be required depending on the investor and investment. Always refer to the relevant application form and prospectus before submitting your instruction.
Include the **Coverall** and **Distribution Mandates** with every application or new account opening request.

Account opening requests CANNOT be submitted by email.

Is a Formal Application Form Required?

Yes – If the investment is:
In a **new name** or with **new registration details**

-Submit a **formal application form**
-Send by **Post, Phone or Document Upload**

No – If the investment is:
A **new designation** holding under an **existing registered name**

--Send by **Post, Phone** or **Fax**

Key Requirements

FATCA and CRS self certificates	Required (Certificates can be provided after the trade).
PAIF Funds	Yes – Client must complete a declaration prior to investment
Instruction Signatures	Two authorised signatures are required. Signatories must print their name and state their capacity
Default Distribution Method	Reinvest
Distribution Mandate Submission	Submit by **Post** or **Document Upload**

Need Help?
For questions, contact us via webchat

Additional guidance is available in the Account Opening Template on the portal
Please note
Account names can be up to **45 characters**.
Account designations can be up to **35 characters.**