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.** Authorised signatory list to be submitted with application.
-Send by **Post, Fax or Document Upload**

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

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

Key Requirements

FATCA and CRS self certificates	Required (Certificates can be provided after the trade).
PAIF Funds	No
Instruction Signatures	Signature requirements on all instructions: either one signature (under seal) by a Director (stating capacity), two signatures from the Director and Secretary (stating capacity) or two authorised signatures from the signature list (stating capacity)
Default Distribution Method	Accumulation Shares (If the initial instruction doesn't specify how the income is to be paid, the default is to invest into the Acc equivalent.)
Distribution Mandate Submission	Post, Fax 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.**