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

Quilter Investors

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?

No – If the investment is:
In a **new name** or with **new registration details**

- Formal application is available if needed, unambiguous instructions will be accepted as long as they fulfil the same criteria as an application form.

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

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

- Formal application is available if needed, unambiguous instructions will be accepted as long as they fulfil the same criteria as an application form.

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

Key Requirements

FATCA and CRS self certificates	Required (Certificates can be provided after the trade).
PAIF Funds	No
Instruction Signatures	Two authorised signatures are required. Signatories must print their name and state their capacity
Default Distribution Method	CHQ
Distribution Mandate Submission	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.**