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

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

Key Requirements

FATCA and CRS self certificates	Required (Must be completed on the application form or the trade will be rejected).
PAIF Funds	No
Instruction Signatures	Two authorised signatures are required. Signatories must print their name and state their capacity
Default Distribution Method	BACS
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.**