Please use the below criteria as a requirements guide when submitting an instruction to trade into a new unitholder account.

Please note, additional documentation may be required based on the specifics of the investor and investment. For the avoidance of doubt, please refer to the relevant application form and prospectus documents before submitting your instruction.

To ensure this new account is added to the Secure Distributor Portal please arrange for the linking forms to be completed and sent to us once you have the account number. The Secure Distributor Portal linking request form can be found in the link below, which will enable you to access reporting for your account and will remove the need for manual requests. For more information, and to access the linking form, please visit https://www.distributorportal.co.uk/documents-guides/secure-distributor-portal/linking-guide

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Please ensure you complete and send Coverall & Distribution Mandates' with application or new account opening request.

Is a formal application form required when a subscription will create a new account:	In a new name or registration details? →	Formal application form is required: By Fax or Post – Application form is available upon request from CapitalGroup_UKSales@capitalgroup.com
	As a new designated holding under an existing registered name? →	Not Required

Are FATCA and CRS self certificates required?	Yes	
Are PAIF funds available for investment?	No	
What signatures must be provided on instructions?	Two authorised signatories	Please ensure signatories state the name of the person and state their capacity.
What method should the distribution mandate be sent?	Fax or Post	

If you have questions, please contact us via webchat or email #ClientMaintenance1@uk.dstsystems.com
Further guidance is available by referencing the Account opening template accessible on the portal: Account Opening Template

Please note:
Account names can be up to 45 characters long and Account designations can be up to 35 characters long