

Adviser Application Form



Details of Applicant Firm

Adviser Firm Name:	
Firm Address:	
Postcode:	FCA Number:

Design Portfolios:

RSM	✓
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Platform(s) Required:

Aviva (Rebalance on or after 15 th each month)	✓	Standard Life (Rebalance on or after 25 th each month)	✓	Transact (Rebalance on or after 26 th each month)	✓	Embark (Rebalance on or after 10 th each month)	✓
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If your clients wish to hold models on the Transact platform then you will also need to liaise directly with Transact to set up adviser access along with completing this acceptance of terms. A Transact TP2 form will also need to be completed by your client, this can be found in the 'Managed Model Portfolio - How to Apply' section on the Verbatim website.

Fees & Payment:

The fee for the provision of the Managed Portfolio Service shall be as set out in the Terms & Conditions of Business

Authorisation & Signature:

We hereby confirm that we wish Waystone Management (UK) Limited to provide the Managed Portfolio Service to us and that we:

1. Are a professional client and are authorised and regulated by the Financial Conduct Authority
2. Have read and understood the attached Terms and Conditions; and
3. Agree to be bound by the Terms and Conditions

Authorised Signatory (1):	
Name:	Date:
Authorised Signatory (2) (if applicable):	
Name:	Date:

Once complete, please return this signed form to:

Verbatim Discretionary Managers (trading name of Waystone Management (UK) Limited), 2nd Floor, 20-22 Bedford Row, Holborn, London, WC1R 4EB and a scanned copy to verbatimDM@waystone.com.