Adviser Application Form

verbatim
Asset Management

Details of Applicant Firm

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

Design Portfolios: RSM | Square Mile

Platform(s) of Choice: Aviva | Standard Life | Transact | Zurich

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 DMS Investment Management Services (UK) 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 DMS Investment Management Services (UK)), 2nd Floor, 20-22 Bedford Row, Holborn, London, WC1R 4EB and a scanned copy to verbatimDM@dmsgovernance.com.