

# Cavendish Online FundSupermarket Client Declaration

To:

FREEPOST  
CAVENDISH ONLINE

Cavendish Online,  
20 Cathedral Yard,  
Exeter  
EX1 1HB

**Please only put the above text on the envelope**

This freepost address is 2<sup>nd</sup> class.  
If your item is urgent please use full  
address and affix 1<sup>st</sup> class postage.

Dear Sirs,

Date:.....

Please accept this as confirmation that I have read and understood your Terms and Conditions of Business (available at [www.CavendishOnline.co.uk](http://www.CavendishOnline.co.uk)).

**Client Name(s):** .....

**Phone number(s) – Mobile**.....

- Home .....

**Email address(es):**.....

On the basis of the above and the conditions listed below please arrange the following on my behalf:

## Change of agency request

**- to link the Fidelity accounts on the following page to Cavendish Online Investments Ltd**

I confirm that I have not sought or received any advice from Cavendish Online in relation to the above.

I accept that in addition to any fund charges, a 0.20% platform charge will be paid to FundsNetwork (reduced to 0.15% on the entire balance if your account is valued at more than £200,000) and a 0.05% fee will be paid to Cavendish Online.

Additional fees will apply to Shares, Investment Trusts and Exchange Traded Funds, please check our website for more details, [www.cavendishonline.co.uk](http://www.cavendishonline.co.uk) or contact us if you require clarification.

I also acknowledge that Cavendish Online will not review any transactions that I submit.

Please accept this written authority to arrange this Change of Agency on my behalf.

**Where did you hear about Cavendish Online?** .....

.....  
**Client signature(s)**

**Fidelity: Application for Change of Agency**

**(To be posted to Cavendish Online so that we can arrange with Fidelity)**

Policy company address:

Account holder's address:

Fidelity  
Broker Services  
Oakhill House  
130 Tonbridge Road  
TONBRIDGE  
TN11 9DZ

.....  
.....  
.....

Tel No:.....

Date: .....

Dear Sirs,

Account Number or Customer Reference Number (CRN).....

Account type: ISA / JISA / Investment Account (Non-ISA) / Pension  
*please circle the relevant account type(s)*

Title (Mr, Mrs, Miss, Ms Dr, etc)	Full name	Date of birth (dd/mm/yy)	National Insurance Number

Please transfer the agency and servicing of the above plan to:

Cavendish Online Investments Ltd  
20 Cathedral Yard  
Exeter  
EX1 1HB  
(Agency No. 637238)

If you have any queries please contact either Cavendish Online on 03456 442544 or myself.

Yours faithfully

.....  
Account holder's signature.

.....  
2<sup>nd</sup> Account holder's signature  
(where applicable).