

WealthManager+ Account – J.P. Morgan Stocks and Shares ISA Switching Form

Please complete this form in BLOCK CAPITALS and black ink. This form should then be returned to: **J.P. Morgan Asset Management, FREEPOST NAT17428, London EC2B 2BR.**

If you have any questions regarding this form, please call our Investor Services team on 0800 20 40 20.

J.P.Morgan
Asset Management

WealthManager+

Financial Adviser's stamp

FSA number

Agent number

(Please note, no financial adviser commission is payable through J.P. Morgan WealthManager+)

1. About you

Your title (e.g. Mr/Mrs/Miss/Ms/Other) Surname

First name(s) in full

Your existing account number

Your permanent residential address

Postcode

Daytime telephone number

Evening telephone number

Email address

2. Your instructions

Please enter below your switching instructions. Please note your investment will be exposed to stock market movements during this switch.

If you invest regularly into the investments you are switching out of, do you wish to continue the payment into your new investment(s):

Yes

No

If no, regular payments will continue into your old investments.

Name of J.P. Morgan investment(s) you wish to switch from	Amount you wish to switch (e.g. total holding, a specific amount in units/shares/£s or % of investment)			Name of J.P. Morgan investment(s) you wish to switch to	If switching into J.P. Morgan Managed Funds, please indicate the share class you would like ^A	
	Number of units/shares	Amount	Percentage of investment		Inc	Acc
		£	%			
		£	%			
		£	%			
		£	%			

^A If you have not marked either box, we will automatically buy accumulation shares.

3. Income details

If you would like to change your existing income preferences, please complete this section.

Please indicate your income preferences for your J.P. Morgan ISA. This instruction will apply across your entire J.P. Morgan ISA.

Reinvest income in additional shares of the same investment

Pay income as cash into your J.P. Morgan ISA

Pay income as cash into your WealthManager+ Cash Account

Pay income into your bank or building society account.

If you select for income to be paid into your bank or building society account, please complete the section overleaf.

3. Income details continued

Please indicate when you want your income to be paid out:

<input type="checkbox"/> Immediately	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Annually
<input type="checkbox"/> Monthly	<input type="checkbox"/> Twice yearly	<input type="checkbox"/> Specify a minimum amount £ <input type="text"/>

Name of bank or building society

Name of account holder(s)

Branch address

 Postcode

Account number

Bank sort code

Reference number (Building society)

4. Your signature and declaration

Please refer to the Key Features and Terms and Conditions document for investment limits, details and how your personal data may be processed.

Your signature

Date (Day/Month/Year)

Please note all correspondence should be sent to the address shown at the top of the application and not to the registered address.

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