

Irrevocable designation

Private & confidential - when completed

The information contained within this form relates to application reference number

Where you wish to apply an irrevocable designation to your GIA please complete this form.

Please complete the details below. Verification of identity will be required for each designated person. This form should be submitted along with the client confirmation GIA application.

Details of designated person

Title (Mr/Mrs/Miss/Ms/other)	<input type="text"/>	Surname	<input type="text"/>
Forename(s) (in full)	<input type="text"/>		
Date of birth	<input type="text"/>	Male	<input type="checkbox"/> Female <input type="checkbox"/>
Place of birth: City/Town	<input type="text"/>	Country	<input type="text"/>
Permanent residential address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

Are you a US citizen, resident or passport holder? Yes No

Are you a tax resident outside the UK? Yes No

Country of tax residency	Tax identification number
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Details of designated person

Title (Mr/Mrs/Miss/Ms/other)	<input type="text"/>	Surname	<input type="text"/>		
Forename(s) (in full)	<input type="text"/>				
Date of birth	<input type="text"/>	Male	<input type="checkbox"/>	Female	<input type="checkbox"/>
Place of birth: City/Town	<input type="text"/>	Country	<input type="text"/>		
Permanent residential address	<input type="text"/>				
	<input type="text"/>				
	<input type="text"/>	Postcode	<input type="text"/>		

Are you a US citizen, resident or passport holder?

Yes No

Are you a tax resident outside the UK?

Yes No

Country of tax residency

Tax identification number

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Please note: an irrevocable designation will create a bare trust in favour of the designated person(s) above and cannot be changed once it has been accepted.

The designation may also change the individual who would otherwise be assessed for the purposes of income tax or capital gains tax.

If you wish to appoint more than two persons please print a further copy of this page.



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