

Please refer to the instructions at the end of this form, before completing it.

- This form is to amend your monthly payment to your account
- Please complete this form in blue or black ink

## 1 Investor Details *Compulsory*

Unitholder number									
Title									
First name(s)									
Surname									
Designation* (if applicable) must be shown as initials and/or numeric									
Permanent residential address									
					Postcode				
Telephone number									

## 2 Investment Allocation *Compulsory*

Please ensure you have read the most recently issued Key Investor Information Document for the fund and share class you are amending.

**Please tick one box to let us know which investment product you wish to amend.**

<input type="checkbox"/> Unit Trust	<input type="checkbox"/> Stocks & Shares ISA
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Complete this section to increase/decrease your monthly amount or change your fund choice.

Fund choice	Current Monthly Saving	New Monthly Saving
1.	£	£
2.	£	£
3.	£	£
4.	£	£
	Total £	Total £

Please note that to obtain income from the Jupiter Merlin Monthly Income Select Fund or the Jupiter Monthly Alternative Income Fund, a minimum investment of £5,000 is required.

### 3 Income Distribution and Withdrawal Payment Bank Details

If you want income paid to you, please complete the section below otherwise your investment will be placed into accumulation units and any income will be accumulated within the fund.

Name of Bank/Building Society								
Bank address								
Postcode								
Bank account name							Building Society roll no. (if applicable)	
Bank/Building Society sort code								
Bank/Building Society A/C no.								

**Tick if you want these to apply to:**

<input type="checkbox"/> Income distributions	<input type="checkbox"/> Withdrawal payments
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If you don't provide income details for your distributions, your investment will be placed into accumulation units and any income will be accumulated within the fund.

It is your responsibility to let us know if your bank details change.

### 4 Agent Details *To be completed by your agent if appropriate*

☐ Please tick this box if advice **has** been provided in connection with this application.

☐ Please tick this box if advice **has not** been provided in connection with this application.

Agent stamp
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Consultant's name
Agency number

**5 Declaration** *Compulsory*

I/We hereby instruct Jupiter Unit Trust Managers Limited to switch my/our fund(s) and/or change my/our monthly savings amount as detailed in section 2\*.

I/We confirm that:

- A. I/We have read and retained the Supplementary Information Document and Terms & Conditions together with the most recently issued Key Investor Information Document(s), relevant to the Fund(s) and share class selected in section 2.
- B. I am/We are not (a) US Person(s) nor am I/are we applying for units on behalf of (a) US Person(s) nor am I/are we applying for units in order to further offer, sell or transfer such units directly or indirectly to (a) US Person(s), (a 'US Person' is a national, citizen or resident of the United States of America or a corporation or partnership organised under the laws of the United States of America or having a principal place of business in the United States of America).
- C. I am/We are not nor am I/are we applying for units on behalf of (a) Canadian Person(s) or otherwise in a position where you would deal with me or us in or into Canada nor am I/are we applying for units in order to further offer, sell or transfer such units directly or indirectly to (a) Canadian Person(s) or other persons in Canada, (a 'Canadian Person' is a national, citizen or resident of Canada or a corporation or partnership organised under the laws of Canada or having a principal place of business in Canada).

Signature	Date
Signature	Date
Signature	Date
Signature	Date

# Monthly Savings Amendment Form

Important Instructions to help complete this form



## If you need help with this form

- Phone us on **0800 561 4000** (from overseas: **+44(0)1268 448642**) between 9.00am and 5.30pm, Monday to Friday
- Email us at **enquiries@jupiteronline.co.uk**
- Use webchat via our website, **www.jupiteram.com**
- If you want any document in another format (for example Braille, large print or audio), please contact us.

## Advice

We recommend you discuss any investment decisions with a financial adviser, particularly if you are unsure whether an investment is suitable. Jupiter is unable to provide investment advice. You can contact either [www.thepfs.org/yourmoney/find-an-adviser/](http://www.thepfs.org/yourmoney/find-an-adviser/) or [www.unbiased.co.uk](http://www.unbiased.co.uk) who will be able to help you find one.

## Documents to read before you invest

- Please ensure that you have read the following documents before completing this form:
  - The Terms and Conditions.
  - The Key Investor Information Document (KIID) for the relevant fund(s) and share class.
  - The Supplementary Information Document (SID).
- As Direct Debits are collected on the first working day of the month, we need to receive this form by the 15th day of the month.
- Your unitholder number and product can be found on correspondence we have sent you such as contract notes and bi-annual statements.
- We may contact you if we have any questions on your application form.
- If you miss any of the compulsory sections, then your application may be rejected and your investment not made.
- Please return your completed form to us at **Jupiter Unit Trust Managers Limited, PO Box 10666, Chelmsford CM99 2BG.**

## MONTHLY SAVINGS AMENDMENT FORM

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For any help with this application contact us on **0800 561 4000** or via webchat at **[www.jupiteram.com](http://www.jupiteram.com)**

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