

Representative instruction form

This form lets you appoint a Representative to have 'view only' or 'dealing' access to your account(s).

If you want to appoint a family member to have 'view only' or 'dealing' access to your account, you'll need to complete a 'Family Linking Form' instead – which you can find on our website.

To act on your behalf, a Representative must have an account with AJ Bell Youinvest. That way, we'll be able to perform all the identity and verification checks we need before we can give them access to your account. Before you complete and send this form to us, your Representative will need to have opened an account and been sent an account number.

Keep in mind that you can't appoint a financial adviser acting in a professional capacity to have 'dealing' access to your account.

Also, you can't appoint a Representative for Junior ISA accounts. That's because Junior ISAs can only be managed by the parent or legal guardian (the 'registered contact') who opened the account.

Before we grant your Representative access to your account, we'll send a secure message to you.

If you'd like a copy of this or any other item of our literature in large print, Braille or audio format, please contact us on 0345 54 32 600, or by email at enquiry@youinvest.co.uk.

Your details

Full name

Permanent residential address

Postcode

Country

Account number

Representative access instruction (please tick one box only)

By signing below you:

- authorise AJ Bell Management Limited, Sippdeal Trustees Limited and AJ Bell Securities Limited (together 'AJB Companies') to disclose information about your account to the Representative
- acknowledge that the Representative will be granted either 'view only' or 'dealing' access to your accounts. Dealing access will enable the Representative to buy and sell investments, create and respond to secure messages and make elections for Corporate Action options
- acknowledge that your authority shall apply to all AJ Bell Youinvest accounts that you hold, unless otherwise instructed by you
- acknowledge that you must notify AJ Bell Youinvest in writing if you intend to cancel this authority and that the Representative permissions shall remain in place for your account(s) until AJ Bell Youinvest confirms by secure message that your instructions have been actioned

- agree to indemnify the AJB Companies from and against all claims, demands, liabilities, costs, losses and expenses (including legal costs) suffered or incurred arising directly or indirectly as a result or any act or omission on the part of the Representative in relation to your AJ Bell Youinvest account(s)

Please note your Representative will not be able to change any personal details, passwords, or security questions or instruct withdrawals to be made from your AJ Bell Youinvest account(s).

'View only' access to my
AJ Bell Youinvest account(s)

'Dealing' access to my
AJ Bell Youinvest account(s)

Signature

Date

Representative details

Full name

Permanent residential address

Postcode

Country

Account number

Representative declarations

I consent to act as a Representative for the customer named above.

I confirm that I am not acting as a financial adviser where I am to be provided with 'dealing' access

I agree to act in accordance with the relevant account terms & conditions

I agree to indemnify AJ Bell Management Limited, Sippdeal Trustees Limited and AJ Bell Securities Limited (together "AJB Companies") from and against all claims, demands, liabilities, costs, losses and expenses (including legal costs) suffered or incurred arising directly or indirectly as a result of any act or omission on my part in relation to the account(s) of the customer listed above.

Representative to sign:

Signature

Date

Next steps

Once this form is completed and signed by both you and your Representative, please post it to:

AJ Bell Youinvest
Customer Services Team
4 Exchange Quay
Salford Quays
Manchester
M5 3EE