

About this form

- ALL sections of this application form are mandatory - any missing information will slow down your application
- Your email address will be used for setting up your account password and may be used to contact you about your account application.
- Your mobile number will be used for secure ID authentication in certain areas of the website and when calling up The Chairperson, Treasurer or Secretary must complete this form to add a new member to the Club's Share Dealing Account.
- Please record the personal details of the new member in Section 2.
- The new member detailed in Section 2 of this form must read and sign the New Member Declaration in Section 3.
- Please send an updated copy of the Club's Rules or Constitution if these documents have recently changed

Section 1 - Investment club details

Investment Club name

Account Number

Your name

Your position (i.e. Chairperson, Treasurer)

I hereby request that the person named in Section 2 of this form be added as a member of the above named Investment Club in respect of the Share Dealing Account which we hold with Interactive Investor.

Signature

Date

 / / 

Please print and complete sections 2 & 3 for each member you wish to add to your account.

Section 2 - New member details

Title

Date of Birth

 / /

First name(s)

Surname

Phone number

Mobile number

Email

Address

Previous address (if less than 3 years at current address)

Nationality

Place of birth (town & country)

Occupation (if retired please state previous occupation)

National Identifier

For the purpose of taxation I am a resident in the following countries and my tax identification number (TIN) is set out below. Please indicate 'N/A' if a TIN is unavailable. (Please continue on a separate if required)

Country

Tax Identification Number (TIN)

Country

Tax Identification Number (TIN)

Section 3 - New member declaration

I wish to be added to Investment Club Share Dealing Account detailed in Section 1 of this form.

I confirm that we have been given the opportunity to read and consider the Interactive Investor Terms of Service that will form the contract between us and upon which Interactive Investor intend to rely. For my own benefit and protection, I should read these Terms carefully before starting to trade. I can ask for further information if we do not understand any point.

I/we consent to the use of my/our personal information as set out in Interactive Investor's Privacy Policy.

I understand that Interactive Investor are not obliged to accept my application to become a new member of the Investment Club and do not have to give reasons for not proceeding with my application.

I confirm that I am 18 years of age or over and the information given is true and correct to the best of my knowledge and beliefs.

I confirm that I am not a U.S. citizen or resident in the U.S. for tax purposes.

I will undertake to notify you promptly of any changes to the details supplied within 30 days of a change in circumstance.

Signature

Date

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Please return your completed form to:

Account Management, Interactive Investor, Exchange Court, Duncombe Street, Leeds, LS1 4AX

Should you require any help completing this form you can get in touch via www.ii.co.uk/contact-us

Section 4 - Guidance on National Identifiers

As part of MiFID II legislation, we are required to record your 'National Identifier'. This could take a number of different forms depending on your nationality. Please see the below list of National Identifiers to help you identify what yours is. N.B. If you have more than one nationality, please provide a National Identifier for each of them.

Country Name	1st Priority Identifier	2nd Priority Identifier
Austria	(No National Identifier required)	
Belgium	Belgian National Number (Numéro de registre national – Rijksregister-nummer)	
Bulgaria	Bulgarian Personal Number	
Cyprus	National Passport Number	
Czech Republic	National identification number (Rodné číslo)	Passport Number
Germany	(No National Identifier required)	
Denmark	Personal identity code: 10 digits alphanumerical: DDMMYYXXXX	
Estonia	Estonian Personal Identification Code (Isikukood)	
Spain	Tax identification number (Código de identificación fiscal)	
Finland	Personal identity code	
France	(No National Identifier required)	
United Kingdom	UK National Insurance number	
Greece	10 DSS digit investor share	
Croatia	Personal Identification Number (OIB – Osobni identifikacijski broj)	
Hungary	(No National Identifier required)	
Ireland	(No National Identifier required)	
Iceland	Personal Identity Code (Kennitala)	
Italy	Fiscal code (Codice fiscale)	
Liechtenstein	National Passport Number	National Identity Card Number
Lithuania	Personal code (Asmens kodas)	National Passport Number
Luxembourg	(No National Identifier required)	
Latvia	Personal code (Personas kods)	
Malta	National Identification Number	National Passport Number
Netherlands	National Passport Number	National Identity Card Number
Norway	11 digit personal id (Foedselsnummer)	
Poland	National Identification Number (PESEL)	Tax Number (Numer identyfikacji podatkowej)
Portugal	Tax number (Número de Identificação Fiscal)	National Passport Number
Romania	National Identification Number (Cod Numeric Personal)	National Passport Number
Sweden	Personal identity number	
Slovenia	Personal Identification Number (EMŠO: Enotna Matična Številka Občana)	
Slovakia	Personal number (Rodné číslo)	National Passport Number
All other countries	National Passport Number	