



2 Trust details

Trust title   
(eg 'the Mary Brown Will Trust dated 1 April 2001')

Please complete section A or B below

A. for LIFETIME SETTLEMENTS

Date of Declaration of Trust/Settlement Date (dd/mm/yyyy)

Full name(s) of Settlor(s)

Trust policy details (to be completed in the case of a policy trust)

B. for WILL TRUSTS

Date of testator's death (dd/mm/yyyy)

Full name(s) of testator

3 Investment option required

Please tick the box (✓)

Option 1: UK Protected Portfolio Investment plan  Investment amount (minimum £3,000) £

Please tick the box (✓)

Option 2: Global Vista Protected Portfolio Investment plan  Investment amount (minimum £3,000) £

Total investment across all options £

Please make your cheque payable to Morgan Stanley & Co. International plc. Please also write your full name and the name of the plan you are investing in on the back of the cheque to ensure timely processing of your application.

4 Data protection

I/We understand that my/our personal details will be passed to or used by Morgan Stanley & Co. International plc or other member companies of the Morgan Stanley Group for the purposes of administering my/our investments and for fraud prevention. This could include passing details to agents of the Morgan Stanley Group and sub-contractors in the UK or any other country (even those which have only limited or no applicable Data Protection Laws) provided that Morgan Stanley & Co. International plc remains responsible for making sure the information is held securely.

Morgan Stanley & Co. International plc may, from time to time, send you information (by post, e-mail or phone) about their products and services and/or products and services of their associated companies. This information may not directly relate to financial services. By signing this agreement, you agree to all such marketing.

If you would prefer not to receive such information, please tick this box. (✓)



I/We authorise Morgan Stanley & Co. International plc as Plan Manager:

- 1) To hold cash subscriptions, Plan investments, interest, dividends, shares and any other rights or proceeds in respect of those investments and any cash or other proceeds.
- 2) On request, to pay to the Trustees of the Trust the cash proceeds of the Plan investments.

**Signature(s)**

**Trustee for correspondence**

1. Signature

Date (dd/mm/yyyy)

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**Other Trustees' signatures (all Trustees or authorised signatories to sign)**

2. Signature

Date (dd/mm/yyyy)

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3. Signature

Date (dd/mm/yyyy)

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4. Signature

Date (dd/mm/yyyy)

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Please return this completed form together with your cheque to your financial adviser, who will then pass them on to:  
Morgan Stanley & Co. International plc, Administration Office, BNY Mellon House, Ingrave Road, Brentwood, Essex CM15 8TG.  
Telephone: +44 (0)844 892 2201.

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