

Appropriateness & Suitability Questionnaire

The following questions are designed to establish whether this product is appropriate for you and to ensure that you have fully understood the potential risks associated with an investment in this type of product. If you are unsure about the suitability of this product we recommend you seek financial advice.

Plan Name _____

Do you currently hold any of the following types of investments:

- Bank Deposits
- Structured Products
- VCT/EIS
- Unit Trusts
- Direct Equity Investment
- Stocks & Shares ISAs

Have you received and read a copy of the Key Information Document (KID) for this plan? Yes No

Do you understand that the plan is designed to be held for the full investment term and if you were to cash in early you may get back less than you originally invested? Yes No

Do you understand the compensation arrangements applicable to this plan? Yes No

Do you understand the tax implications of your investment? Yes No

Do you understand that this plan should only form part of a diversified investment portfolio? Yes No

Do you understand that Moneyworld have not provided you with financial advice or made a personal recommendation to invest in this product? Yes No

If you have answered no to any of the above then this product may not be suitable and you should seek financial advice.

Applicant 1 - Full Name _____

Applicant 1 – Signature _____ Date _____

Applicant 2 (if applicable) – Full Name _____

Applicant 2 – Signature _____ Date _____