

PORTFOLIO CHARACTERISTICS

Please select the description that best fits an appropriate investment strategy. The characteristics below are for illustration purposes only to assist in gauging the relevant approach to investments; the returns and volatility information below cannot be assured.

PORTFOLIO RISK STRATEGY	EXPECTED PERFORMANCE CHARACTERISTICS IN NORMAL CONDITIONS		
	POSITIVE ANNUALISED 5 YEAR ROLLING RETURN	WORST CASE 12 MONTH DOWNSIDE	
Capital Preservation	0% - 1%	0% to -2%	<input type="checkbox"/>
Low	1% - 3%	-2% to -4%	<input type="checkbox"/>
Balanced	3% - 5%	-8% to -10%	<input type="checkbox"/>
Growth	5% - 7%	-15% to -20%	<input type="checkbox"/>
Maximum Growth	7% - 10%	-25% to -40%	<input type="checkbox"/>

VALUATION REPORTS

Nedgroup Trust will provide a report annually detailing the current value of assets held within the Trust.

DATE EACH YEAR YOU REQUIRE THE ASSETS TO BE VALUED AT. (normally fiscal year end)	
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The Trustees will regularly monitor the performance of investment advisers. Please indicate the currency in which we should measure performance and produce valuation reports.

VALUATION CURRENCY	<input type="checkbox"/> £ <input type="checkbox"/> \$ <input type="checkbox"/> €	BASE CURRENCY FOR INVESTMENT	<input type="checkbox"/> £ <input type="checkbox"/> \$ <input type="checkbox"/> €
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INCOME REQUIREMENTS

DO YOU ANTICIPATE ANY NEED FOR REGULAR INCOME IN THE NEXT THREE YEARS?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF YOU HAVE ANSWERED YES, PLEASE SUPPLY DETAILS OF YOUR REQUIREMENTS.	

LIQUIDITY/CAPITAL REQUIREMENTS

DO YOU ANTICIPATE ANY NEED FOR A LARGE CAPITAL WITHDRAWAL FROM THE TRUST IN THE NEXT THREE YEARS?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF YOU HAVE ANSWERED YES, PLEASE SUPPLY DETAILS OF YOUR REQUIREMENTS.	

SIGNATURE	
PRINTED NAME	
DATE (DD/MM/YYYY)	
INTERNAL REFERENCE Guernsey office to complete	

Please note: Nedgroup Trust is not an investment adviser and cannot be held liable for the performance of any investments.

Nedgroup Trust is a registered trade name of Nedgroup Trust Limited and Nedgroup Trust (Jersey) Limited. Nedgroup Trust is a registered trade name of Nedgroup Trust Limited. Nedgroup Trust Limited is licensed by the Guernsey Financial Services Commission under the Regulation of Fiduciaries, Administration Businesses and Company Directors, etc (Bailiwick of Guernsey) Law, 2000 to form, manage and administer trusts, companies, pension schemes and gratuity schemes. Company Registration No. 23460. Nedgroup Trust (Jersey) Limited is regulated by the Jersey Financial Services Commission. Company Registration No. 58621. Nedbank Private Wealth is a registered trade name of Nedbank Private Wealth Limited. Nedbank Private Wealth Limited is not licensed to take deposits under the Banking Supervision (Bailiwick of Guernsey) Law, 1994 and it is not a member of the Guernsey Banking Deposit Compensation Scheme. T30 06/19

For further information on our Terms and Conditions and how we hold personal data (as set out in our Privacy Notice), please refer to our website at www.nedgrouptrust.com.