

# Additional information form

## Fidelity Funds and Fidelity Active Strategy

I/We declare that any payments for funding investments into Fidelity Funds or Fidelity Active Strategy are made from an account held in my/our name and that such amounts were not and are not directly or indirectly derived from activities that may contravene applicable laws and regulations, including, but not limited to, anti-money laundering, counter terrorist financing and tax laws and regulations within my/our country of domicile.

Please complete in BLOCK CAPITALS using black ink.

Any forms received that are not completed correctly may incur delays or may have to be returned to you.

### 1 Customer information

**Surname**

**First and other names in full**

**Existing Fidelity account number**

**Telephone number** (in case of query)

**Your address** – (“Care of” and PO Box are not acceptable. Please ensure the address entered here is your permanent residential address, if this differs from the address held on file by you for Fidelity we may need to seek additional clarification.)

House number/name

Street, city, county and country

 Postcode 

**Country of residence**

**Nationality**

**Identification/passport number**

**Country of tax residence** (if different)

### 2 Joint Ownership – relationship between holders of joint account

Please state the relationship between joint account holders

**Joint holder 1, surname**

**Joint holder 1, first and other names in full**

**Joint holder 2, surname**

**Joint holder 2, first and other names in full**

## 2 Joint Ownership – relationship between holders of joint account (continued)

Joint holder 3, surname

Joint holder 3, first and other names in full

Relationship between joint account holders

## 3 Beneficial Owners

Please mark an X in the relevant box below:

The account holder is/are the beneficial owner(s) of the investment held with Fidelity

The account holder is/are not the beneficial owner(s) of the investment held with Fidelity

Please provide below the details of the beneficial owner of the investment held with Fidelity (if different from account holder).

Surname

First and other names in full

Existing Fidelity account number

Telephone number (in case of query)

Your address – (“Care of” and PO Box are not acceptable. Please ensure the address entered here is your permanent residential address, if this differs from the address held on file by you for Fidelity we may need to seek additional clarification.)

House number/name

Street, city, county and country

 Postcode 

Country of residence

Date of birth (DDMMYYYY)

Identification/passport number

Country of tax residence (if different)

## 4 Source of wealth

What is your PRIMARY source of wealth? Please mark an X in the relevant box below and then complete the relevant sections below:

Savings from employment income  Sale of asset

Inheritance/gift/divorce settlement  Lottery/betting win

Other (Please specify)



