Recurring Switch Instruction

Please complete this instruction to request a Recurring Switch on a Novia Global product. If you wish to request a Recurring Switch for more than one product, please complete an instruction for each Product. Once completed, please submit this form via the secure email functionality on the Novia Global website.

All fields are mandatory. Incomplete forms will not be actioned until all information has been received.

Client Details

Client ID	
Full Name	

Recurring Switch Instruction

Please apply a recurring switch to: (eg GIA GBP)

For any switch instruction made on this application please write the names in full as listed on the Novia Global Investments List. The Investments List and fact sheets can be found at www.novia-global.com. Please note that any existing rebalancing instruction is not affected by this instruction.

Option 1 Recurring Switch FROM cash

I wish to switch (amount/currency) From the Cash Facility to the investments listed below

Frequency (select one) Monthly ☐ Quarterly ☐ Annually ☐ Commencing*

With the last switch to take place in

I/We understand, if applicable, this will replace any existing instructions. This instruction will only be applied to cleared funds within the Cash Facility. I understand that in the event of the Cash Facility falling below 2% of the value of the client's currency account, automated processes may mean that assets purchased via this recurring switch are sold to top-up the cash holding to the required level.

Investor information, including any sustainability disclosures on the selected asset(s), can be obtained through the platform Research Hub which is accessed through your secure login. Simply click on the 'Analyse' button where prompted.

Name of Investment	ISIN	Inc/Acc	%

*The recurring switch instruction must be received by us 5 business days before that date.

Option 2 Recurring Switch TO cash

I wish to switch (amount/currency)		From the investments listed below to the Cash Facility					
Frequency (select one)	Monthly	☐	Quarterly	☐	Annually	☐	Commencing*
With the last switch to take place in							

I/We understand, if applicable, this will replace any existing instructions.

Investor information, including any sustainability disclosures on the selected asset(s), can be obtained through the platform Research Hub which is accessed through your secure login. Simply click on the 'Analyse' button where prompted.

Name of Investment	ISIN	Inc/Acc	%

*The recurring switch instruction must be received by us 5 business days before that date.

Adviser Details

I confirm this instruction is provided with the authority of the client detailed above and that an authority has been completed.

Adviser Signature		Date	
Adviser Name			