



Wellesley

0800 888 6001

info@wellesley.co.uk

Wellesley Registration Form

Please complete this form and return to us by post or by email. If you would like to receive an application form by post, please email info@wellesley.co.uk.

To purchase a Wellesley Property Bond, you will need to open an account online with The Share Centre: www.share.com/wellesley-bonds-offer

Personal Details

Title: Dr Dr Mrs Ms Miss

First name:

Last name:

Home phone:

E-mail:

Mobile phone:

Date of birth: / /

(Please note that, to be eligible for a Wellesley account, you must have an e-mail address)

Address

Current address:

Previous address:
(if less than three years
at current address)

Post code:

Post code:

Time at
current address:

Time at
previous address:

Account Security

(We'll ask for this information when you contact us regarding your account, to be sure it's you)

Security question:

Security answer:

Confirmation of net worth and source of funds

Please confirm your approximate net worth:
(excluding your primary residence):

- Under £35,000
- £35,000 – £100,000
- £100,000 – £250,000
- £250,000 – £500,000
- £500,000+

Please confirm the source of the funds that you wish to invest:

- Savings from employment income:
- Profits from your business:
- Retirement income:
- Pension fund encashment:
- Maturing investments/ Sale of investments:
- Fixed deposit savings:
- Other sources (please state):
- Property sale:
- Company sale or sale of an interest in company:
- Inheritance:
- Loan:
- Divorce settlement:
- Gift:

Customer Agreement

Please ensure that all boxes are ticked in order to confirm your consent.

I confirm that I have read, understood and agree to the Terms set out in the Lender Agreement, a copy of which I have received or viewed on the Wellesley & Co website (www.wellesley.co.uk/lender-agreement/).

I confirm that I understand that I am not lending money directly to any of the Wellesley Group companies and instead I am being assigned a portion of one or more loans that have already been made by one of the Wellesley Group companies.

I confirm that I understand that: i) I am being offered a fixed rate of return for the committed lending period; ii) The capital invested may be at risk if the borrower fails to repay a loan to which I am matched; iii) Wellesley & Co is not covered by the Financial Services Compensation Scheme.

I confirm that I have read the Privacy Policy, Website Terms of Use and Cookie Policy.

I would like Wellesley & Co Ltd to contact me about news, as well as special offers and promotions relating to products and services offered by it, Wellesley Secured Finance Plc and Wellesley Finance Plc.

I would like Wellesley & Co Ltd to contact me to take part in research and/or surveys.

I confirm that I have the full legal authority and capacity to enter into this agreement.

Signature

Date: / /

Next Steps

Please complete and return this application form so that we may open your account.

You can send it by e-mail to newaccounts@wellesley.co.uk or alternatively you can post it to:

Freepost WELLESLEY & CO LIMITED or Wellesley, St Albans House, 57/59 Haymarket, London SW1Y 4QX.

It is a UK regulatory requirement that we verify your identity prior to opening your account. In the event that that we are unable to verify your details, we will contact you by email should we require you to provide us with additional documentation.

Once we have verified your personal details, you will receive an email providing you with details on how to fund your new Wellesley account.

Please note that transfers must be made from an account that is in your sole name or joint names. If you wish to make a transfer from a business bank account, please contact us to open an account in the name of your business.

Cheques must be made payable to Wellesley & Co Limited. Funds sent via cheque will be credited to your Wellesley holding account once funds have cleared in our segregated Client Holding Account (six working days from date of receipt).