

The smart investment platform



How to set up a
regular investment
User Guide

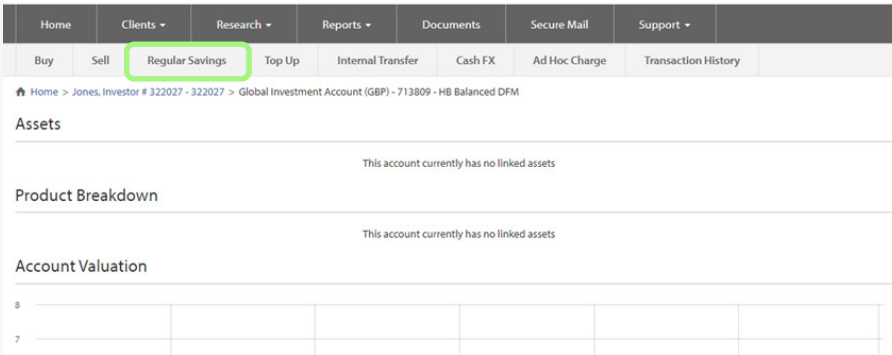


Regular Savings Process

This guide will detail the steps required to set up a Regular Savings Instruction using the online portal.

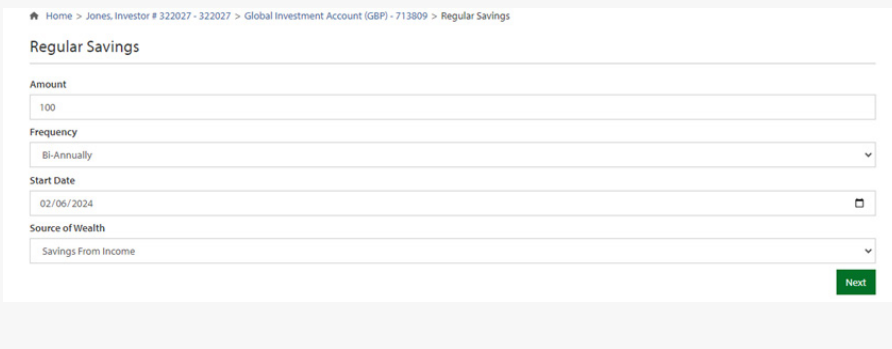
Step 1

Select the Regular Savings option at the top of your account page.



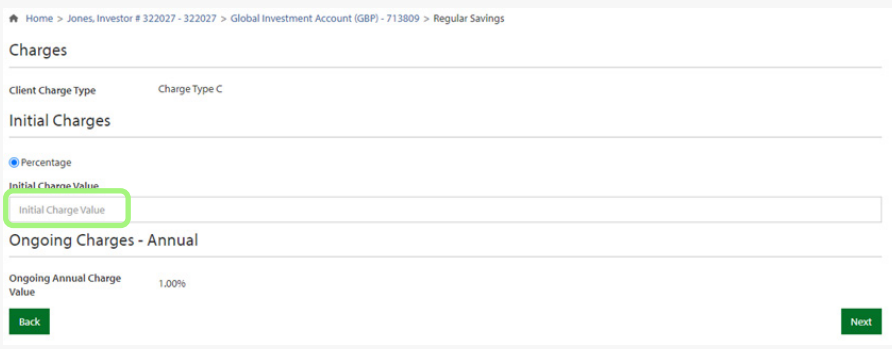
Step 2

Please enter the amount, frequency, start date and source of wealth of your payment. (Please note we call payments made twice a year Bi-Annual Payments)



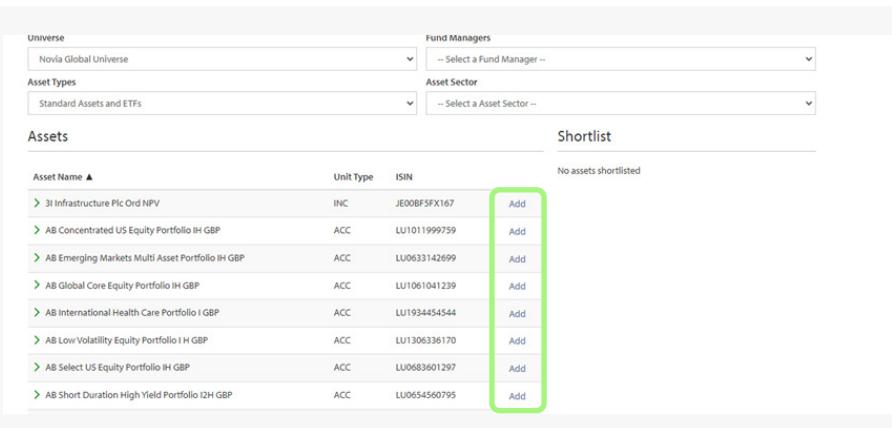
Step 3

Next, fill in your adviser's initial charge amount.



Step 4

On the next screen you will be presented with asset options for your payment, please select a shortlist of investments.



Step 5

Once you have chosen your assets, please provide a percentage allocation for each. (Please note that an allocation of 2% in cash is non-optional)

Home > Jones, Investor # 322027 - 322027 > Global Investment Account (GBP) - 713809 > Regular Savings

Asset Allocation

Asset Name	Investment (%)
Cash	<input type="text" value="2"/>
3I Infrastructure Plc Ord NPV	<input type="text" value="49"/>
AB Emerging Markets Multi Asset Portfolio IH GBP	<input type="text" value="49"/>

total: 100.00

[Back](#) [Next](#)

Step 6

Next you will be provided with a summary of your intended payment instruction.

Home > Jones, Investor # 322027 - 322027 > Global Investment Account (GBP) - 713809 > Regular Savings

Summary

Client Name	Investor # 322027 Jones - 322027
Account Name	Global Investment Account (GBP) - 713809
Initial Charge	0,10 %
Investment Amount	100,00 GBP
Frequency	BI-Annually
Start Date	02/06/2024
Source of Wealth	Savings From Income

AssetName	Investment (%)
Cash	2,00
3I Infrastructure Plc Ord NPV	49,00
AB Emerging Markets Multi Asset Portfolio IH GBP	49,00

[Back](#) [Next](#)

Step 7

Once you are happy with your payment instruction, proceed to the Submission and Declaration page. Please read it carefully and submit.

Home > Jones, Investor # 322027 - 322027 > Global Investment Account (GBP) - 713809 > Regular Savings

Submission

The Novia Global Terms and Conditions form the basis of the contract between Novia Global Limited and the Applicant(s) to use the Novia Global Wealth Management Service. If the Applicant(s) do not understand any point, they should seek clarification from you, as their adviser.

The Applicant(s) must authorise the application for Novia Global Limited's acceptance of its contractual and regulatory obligations.

Declaration

I confirm that the Applicant(s):

- have accepted your Terms and Conditions
- are eligible to hold an account with Novia Global
- are eligible for the investments that will be selected
- have authorised me to submit their application on their behalf
- have been provided with all the information required to authorise me to submit this Application on their behalf
- have been made aware of Novia Global's privacy policy and they understand and consent to our use of their personal data as set out in the privacy policy
- have given me information about their tax residency (including a Tax Identification Number where applicable) and nationality

For the General Investment Account are not US Persons* (any US citizen, national or resident individual, any trust, partnership or corporation organised in the United States of America or under its laws or those of any States)*my declaration in this respect is indisputable

If you are unable to make an indisputable declaration and have any doubts, then you must also submit the additional information on the Foreign Account Tax Compliance Act Form available in the

Step 8

Your Regular Savings Instruction is complete. On the final page you can view the "Application Summary" and "Payment Instruction" Documents. Please download them for your records.

Home > Regular Savings

Complete

Your request has been successfully saved

[Application Summary](#)

[Payment Instruction](#)