



STERLING

Source of investment

Each person making some or all of the investment must complete a separate source of investment questionnaire.
The information requested is necessary to comply with the provisions of the current Financial Services regulations.

Please complete a separate source of investment for each person making the investment. Ensure it is attached to the completed application.

Please tick the appropriate box or use the 'other' box to give details.

Your name

Bond or Investment Account number

Where has this investment come from?

Income ☐

Savings ☐

Inheritance ☐

Property sale ☐

Other

Other details

You do not need to fill in the following details if trustees are applying for the bond/ investment account

Yearly income (including salary, pension or investment income)

£

Occupation(s)

If you are not paying by cheque, please fill in these details

Name of account holder

Name of bank/building society

Branch name

Sort code

--	--	--	--	--	--	--	--

Account number

--	--	--	--	--	--	--	--

Roll number

--	--	--	--	--	--	--	--

Sterling is a trading name of Zurich Assurance Ltd.
Registered in England and Wales under company number 02456671.
Registered Office: Unity Place, 1 Carfax Close, Swindon, SN1 1AP.
Telephone number 0370 909 6010.
We may record or monitor calls to improve our service.