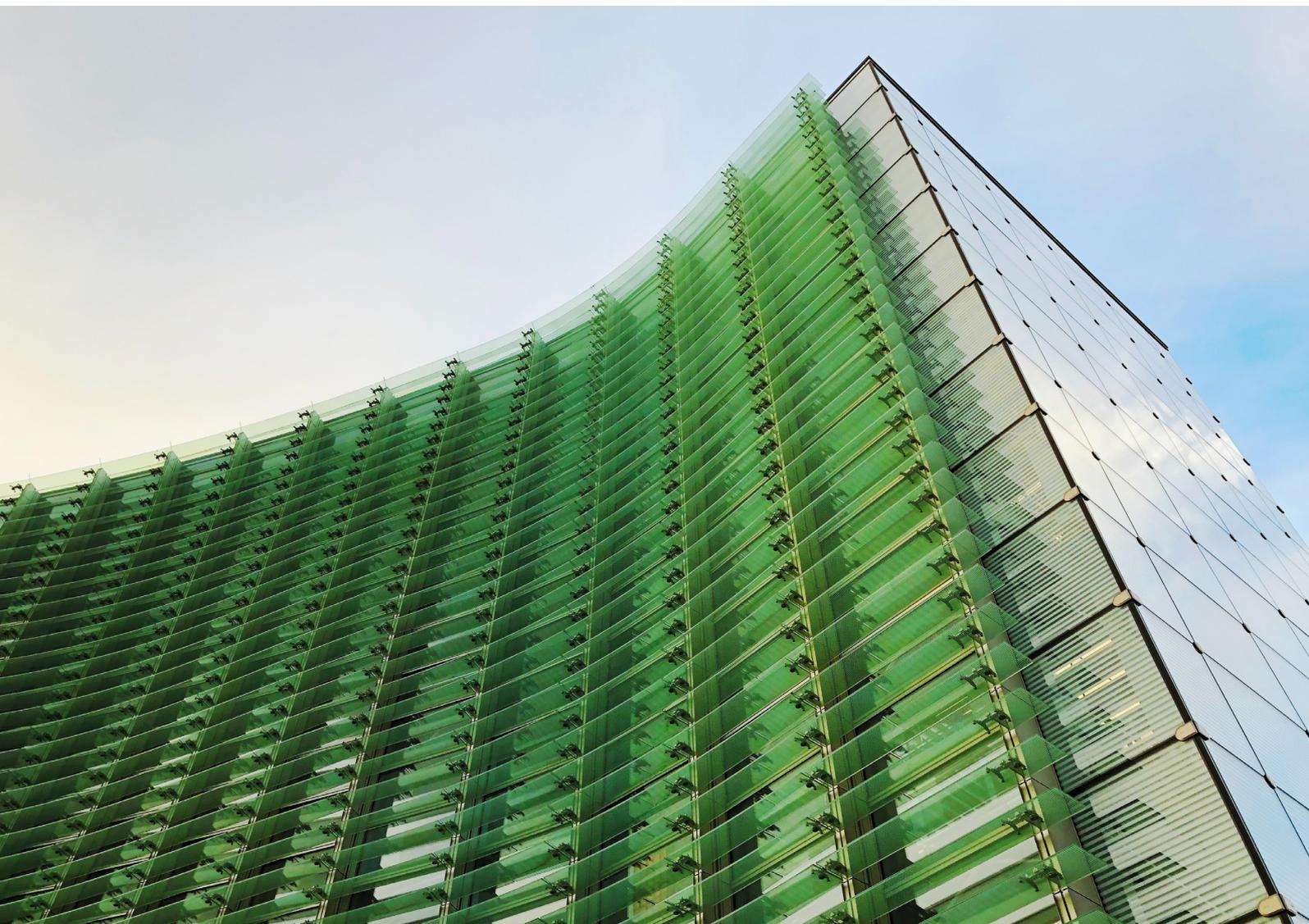




Prudential ISA Online Services

Customer FAQs Add Money In

Frequently asked questions for Investors using the Prudential ISA online services digital portal



1.0 Add Money In

1.1 HOW DO I BEGIN?

From your Dashboard, you can click the 'Add money in' button, located below your personal details on the left-hand side.

The screenshot shows the Waystone Pru dashboard for Celia Mary Nash. At the top, there are navigation links: My dashboard, My documents, My account, Contact details, Help & support, and Log out. The main content is divided into several sections:

- Client Profile:** Celia Mary Nash, Investor ID 251798 (with a 'View +' button), and Ongoing adviser charge: No ongoing adviser charge.
- Summary:** A table showing a Total valuation of £633.08 and an ISA allowance remaining in tax year of £20,000.00. Below this is a note: "Please note: this is a stocks & shares ISA." and a disclaimer: "Where we show you the price and value of your holding, we've used the most recent price that we have. For any new transactions you place, the price may be different to the value shown currently. You can [contact us](#) or your financial adviser if you need any further information."
- Buttons:** Two green buttons are visible: "Add money in" (circled in red) and "Set up a withdrawal".
- Health/Life Event Section:** A grey box titled "Any health/life event we should be aware of?" with text about contacting the adviser and a link to a "Dealing with Client Needs and Circumstances guide".
- Valuation history:** A section with a legend for "Total value" and "PruFund Risk Managed 2" and a partially visible line chart.

1.2 BEFORE YOU START

You will be presented with a 'Before you start' page containing important information about the process of adding money into your Prudential ISA using the online service.

Before making any investment decision, or if you're unsure about any of the information detailed, we recommend you speak with a financial adviser first.

Select the Start button to proceed.

waystone | Pru part of M&G plc

My dashboard My documents My account Contact details Help & support Log out

Dashboard > Before you start

Before you start

Our records indicate you have a financial adviser against your Prudential ISA.

⚠ We strongly recommend that you discuss this with them before you proceed as they are best placed to help and advise you on the best course of action based on your circumstances.

Important information you should consider before proceeding.

The information below provides some common points you should consider and understand before starting your application. Click on the relevant question to expand the information.

If there is anything you are unsure about you can contact us for further information, but please note we cannot provide any advice on whether this is right for you. You should speak to a financial adviser for that reassurance.

⚠ If you proceed with this application, we will treat your request as a non-advised transaction. This means you won't have the same protections as you might have if your adviser submitted this on your behalf. You are solely responsible for ensuring you read and understand all material presented to you, you read, understand and accept the respective declarations at the end of the journey.

If you are happy to proceed with your application, click Start.

Start

What price will you use when my payment is received? **Show**

How much can I pay into my Prudential ISA? **Show**

Paying in a lump sum single contribution **Show**

Lump sum single contribution payment methods accepted **Show**

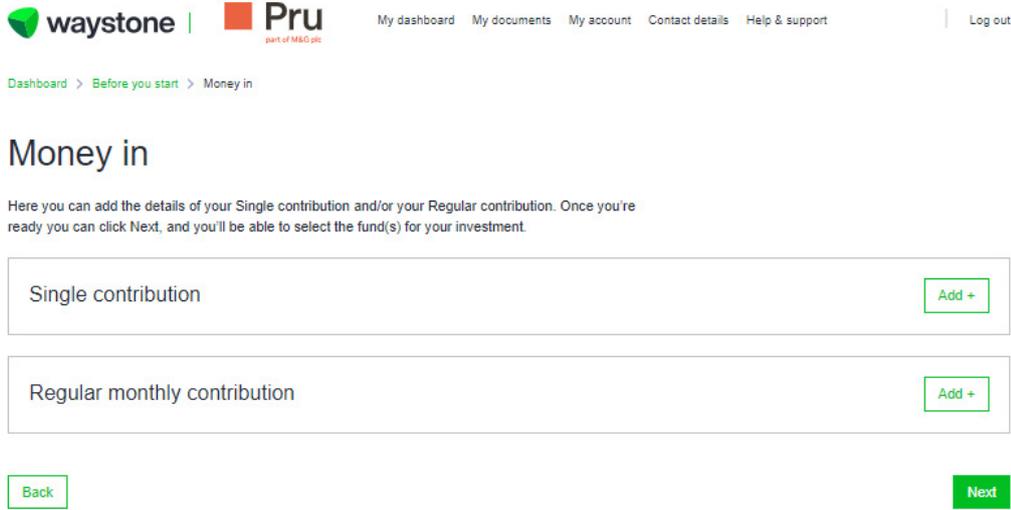
Setting up a monthly regular contribution **Show**

Investing in WS Prudential Risk Managed Open Ended Investment Company (OEIC) funds **Show**

Start

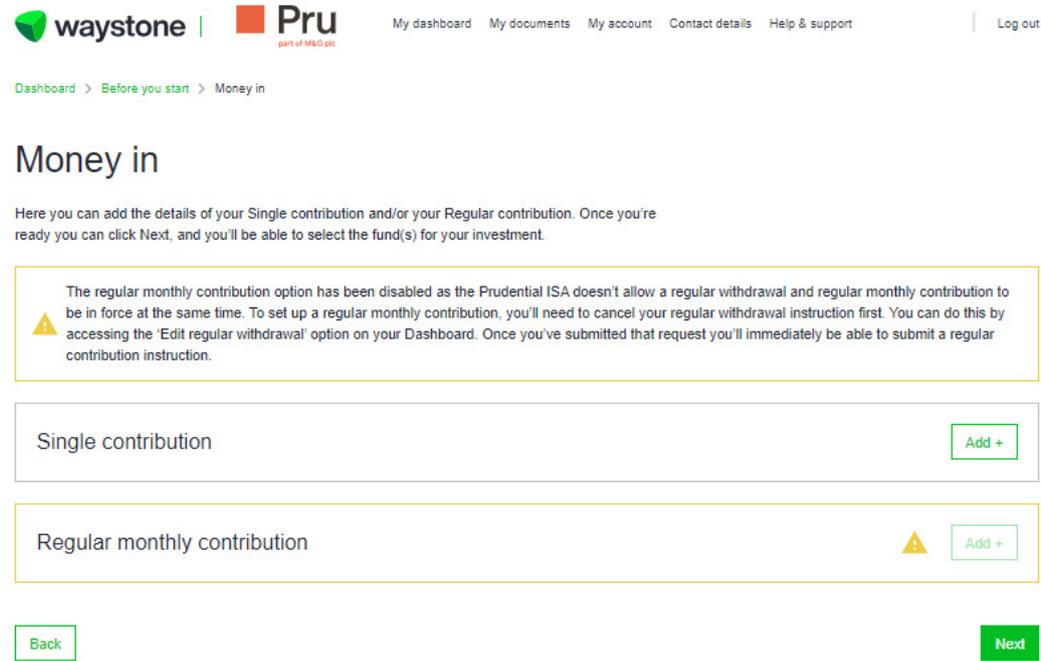
1.3 MONEY IN

On the 'Money in' page, you have the ability to invest in either a single contribution and/or regular monthly contribution. The 'Add+' button will expand each section, allowing you to input all required details.



1.4 WHY IS THE REGULAR MONTHLY CONTRIBUTION OPTION DISABLED?

If you have an existing regular withdrawal plan in place, you will not be able to set up a regular monthly contribution. The Prudential ISA doesn't allow a regular withdrawal and regular monthly contribution to be in force at the same time.



To set up a regular monthly contribution you'll need to cancel your regular withdrawal instruction first. You can do this by accessing the 'Edit regular withdrawal' option on your Dashboard. Once you have submitted that request, you'll immediately be able to submit a regular monthly contribution instruction.

1.5 ADDING A SINGLE CONTRIBUTION

Select the 'Add+' button to expand the single contribution section on the 'Money in' screen and key in the investment amount.

Select the 'Confirm' button to save these details to the application.

  [My dashboard](#) [My documents](#) [My account](#) [Contact details](#) [Help & support](#) [Log out](#)

[Dashboard](#) > [Before you start](#) > [Money in](#)

Money in

Here you can add the details of your Single contribution and/or your Regular contribution. Once you're ready you can click Next, and you'll be able to select the fund(s) for your investment.

Single contribution Close

Amount

£

Payment method

To complete your investment you'll need to make the payment by bank transfer. We'll give you our bank account details and instruction on how to make the payment.

ⓘ We'll give you our bank account details and instruction on how to make the payment. Please note the account must be in your name and payment cannot be made by a third party.

Clear details Confirm

1.6 ADDING A REGULAR MONTHLY CONTRIBUTION

Select the 'Add+' button to expand the regular monthly contribution section on the 'Money in' screen and key in the contribution amount and select your payment day (dd) and first payment date (mm/yyyy).

If you have bank details linked to your account, these will be displayed. If you have multiple bank accounts linked to your account, there is a drop-down menu where you can select a different bank.

Select the 'Confirm' button to save these details to the application.

Regular monthly contribution
Close

Monthly contribution

£

Payment day ⓘ

▼

First payment date

Month Year

/

If we have a bank account on file it will be displayed below. You can change these details if you'd like payment to an alternative bank account.

Please note we can only pay to a UK bank account in which you are named, we can't pay to a third party.

Bank account

▼

Bank name	TAKEON_ROSE
Account type	Bank account
Name on the account	Mrs L E Brown
Sort code	17-46-81
Account number	73811292

Add new bank account

Please note the minimum amount monthly contribution is £50

Clear details
Confirm

Back
Next

1.7 HOW DO I ADD A NEW BANK?

Select the 'Add new bank account' button located below the bank details section. This will bring up fields for you to be able to key in your bank details. The details must relate to a UK bank account and the bank account you add must be in your name, not a third party.

By adding a new bank yourself, we will require appropriate evidence in order to be able to verify your bank account. This information is detailed on the 'What happens next?' page after you submit the application.

Bank name

Account type

Bank account Building society

Name on account

Sort code

 - -

Account number

[Use existing bank account](#)

As you're adding new bank details, you'll need to provide appropriate evidence so that we can verify your bank account details.

 Please ensure you read the information on the **What happens next** page after you submit your request, as this will let you know how you can provide this evidence.

Please note the minimum amount monthly contribution is £50

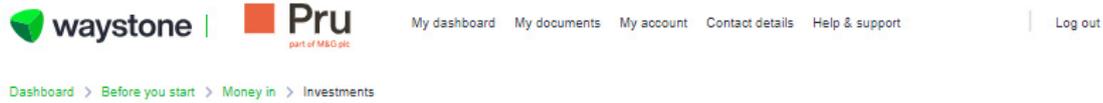
[Clear details](#) [Confirm](#)

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

1.8 INVESTMENTS – ASSET SELECTION

The 'Investments' page allows you to select which assets to invest your money into. If you've chosen both single contribution and regular monthly contribution, you'll have to allocate assets into each one individually.

For easy reference your current holdings are displayed and you are given the option to invest into your existing holdings and/or invest into new funds.



Investment



You should ensure you have read and understood the relevant documents in relation to your fund choice, or had them satisfactorily explained before investing. Please ensure you view these by clicking on the View documents button relating to your fund choice.

Single contribution asset selection

Add +

Regular monthly contribution asset selection

Close

Money to be invested

£100.00

Your Current holdings

Asset name	Regular contribution	Current value
PruFund Risk Managed 2 Fund ISA	£0.00	£633.08 100.00%
Total		£633.08

Are you investing all of your contribution into your existing funds?

Yes No

Confirm

Back

Next

1.9 HOW DO I INVEST INTO A NEW FUND?

If you wish to invest into a new fund, expand the 'Add new funds' section and the full list of available funds is displayed.

We strongly recommend you to seek financial advice before making any changes to your ISA. A financial adviser can ensure that your account remains consistent with your financial needs, your individual circumstances and any changes reflect your attitude to risk.

Add new funds

Close

Asset name	Unit type		
WS Prudential Risk Managed Active 1	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Active 2	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Active 3	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Active 4	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Active 5	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Passive Fund 1	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Passive Fund 2	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Passive Fund 3	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Passive Fund 4	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>
WS Prudential Risk Managed Passive Fund 5	'A' Accumulation	<input type="checkbox"/> Add	<div style="border: 1px solid green; padding: 2px 5px; color: green;">View documents</div>

Add fund(s)

Each of the new funds has a set of documents you are required to read before making your investment. These can be viewed by selecting the 'View document' button related to that fund.

Add new funds

Close

Asset name	Unit type		
WS Prudential Risk Managed Active 1	'A' Accumulation	<input type="checkbox"/> Add	Close documents
<p>Important documents you must read</p> <p>You should ensure that you have received, read and understood or had satisfactorily explained the documents provided below.</p> <p>Before making any investment decision, or if you're unsure about any of the information provided here, we'd recommend you speak with a financial adviser first. If you'd like to speak to us before you make your decision you can contact us. Please note however, we can't provide any advice around what you should or should not do.</p> <p>You can contact our customer support team on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays). Alternatively, you can reach us via email at prudential@waystone.com.</p> <p>Costs and Charges Disclosure View document Costs and Charges Explanation document View document Key Investor Information Document View document</p> <p>Other fund documents</p> <p>The following documents provide additional information you may find useful if you elect to invest.</p> <p>Annual financial reports and statements View document Prospectus View document Fund fact sheets View document</p>			
WS Prudential Risk Managed Active 2	'A' Accumulation	<input type="checkbox"/> Add	View documents
WS Prudential Risk Managed Active 3	'A' Accumulation	<input type="checkbox"/> Add	View documents
WS Prudential Risk Managed Active 4	'A' Accumulation	<input type="checkbox"/> Add	View documents

Once you have read the fund document and have decided to proceed to invest in a new fund, tick the checkbox against the new fund(s) you want to invest into and press the 'Add fund(s)' button. This will move the funds into the 'Asset selection' section, allowing you to key in a percentage to invest. Should you change your mind and no longer wish to invest in these funds, use the 'Remove' link related to that fund.

Are you investing all of your contribution into your existing funds?

Yes No

Asset selection for regular contribution

Asset name	Asset allocation	Investment amount
PruFund Risk Managed 2	<input type="text"/> %	View documents
WS Prudential Risk Managed Active 1 'A' Accumulation ISA	<input type="text"/> %	Remove View documents
Allocation remaining	100 %	

Add new funds

Use the 'Add new funds' option to view and select the new fund(s) you wish to invest in. When you've selected your new fund(s) they'll appear with your existing fund(s) in the table above. The regular contribution must be at least £50.00 per fund.

Add new funds
[Add](#)

[Confirm](#)

1.10 SUMMARY – CONFIRM YOUR APPLICATION DETAILS

The 'Summary' page replays all of the information captured in the application. Please expand each section and read through it carefully.

Summary

Please review each of the sections below. It is important the information on the application is as accurate as possible. You can edit these sections at any point on this page and select 'confirm' when complete.

You'll be able to see details of your request in the 'My Applications' section of your Dashboard. If you exit this request before completing and submitting all required information, you'll be able to access the saved request in the 'My Applications' section under 'Your saved applications' where you'll be able to complete any outstanding information.

Money in
Close

Single contribution
Edit

Single contribution amount	£1,000.00
Payment method	Visa debit card
Total payment due	£1,000.00

Regular contribution

Monthly contribution	£100.00
Payment day	4th
First payment date	04/12/2024

Confirm

Investment
Check

Print all application details

You can download all the details for the application.

[Print application summary](#)

[Back](#)

[Next](#)

If the information is accurate, select the 'Confirm' button in each section. You'll notice a green tick against the section. You'll not be able to proceed until all sections have been confirmed.

The screenshot shows the top navigation bar with the Waystone Pru logo and links for 'My dashboard', 'My documents', 'My account', 'Contact details', 'Help & support', and 'Log out'. Below the navigation is a breadcrumb trail: 'Dashboard > Before you start > Money in > Investments > Summary'. The main heading is 'Summary'. Two paragraphs of text provide instructions on reviewing and confirming the application sections. Below the text are two summary cards: 'Money in' and 'Investment', each with a green checkmark and an 'Edit' button. A 'Print all application details' section follows, with a 'Print application summary' button. At the bottom, there are 'Back' and 'Next' buttons.

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My dashboard My documents My account Contact details Help & support Log out

Dashboard > Before you start > Money in > Investments > Summary

Summary

Please review each of the sections below. It is important the information on the application is as accurate as possible. You can edit these sections at any point on this page and select 'confirm' when complete.

You'll be able to see details of your request in the 'My Applications' section of your Dashboard. If you exit this request before completing and submitting all required information, you'll be able to access the saved request in the 'My Applications' section under 'Your saved applications' where you'll be able to complete any outstanding information.

Money in	✓	Edit
Investment	✓	Edit

Print all application details

You can download all the details for the application.

Print application summary

Back Next

If you notice that any information is incorrect, you can navigate back through the application by using the 'Back' button.

1.11 DECLARATIONS

The 'Declarations' screen details two declarations: ISA declarations and Personal declarations. Select the 'Add+' button to expand each declaration and read in full before you tick the checkbox and select the 'Accept' button.

It is important that you read through both declarations carefully so you are aware of the legal contract, terms and conditions that you are agreeing to accept. If you have any questions we recommend you contact your financial adviser.



[Dashboard](#) > [Before you start](#) > [Money in](#) > [Investments](#) > [Summary](#) > [Direct debit guarantee](#) > [Declarations](#)

Declarations

You must access each of the declarations below by clicking the Add+ button, reading the declarations, acknowledging you have read and understood the declarations and Accept each.

You will not be able to submit the application until you have completed all required declarations.

ISA declarations	<input checked="" type="checkbox"/>	Edit
Personal declarations	<input checked="" type="checkbox"/>	Edit

1.12 MAKE PAYMENT BY BANK TRANSFER – SINGLE CONTRIBUTION

If you have selected a single contribution with payment method as bank transfer, you will be directed to the relevant page which details the investment amount and the bank details to transfer the money to.

It is important that you quote the Payment Reference when making the bank transfer to avoid any complications or delays in allocating the funds and processing the trade.



[My dashboard](#) [My documents](#) [My account](#) [Contact details](#) [Help & support](#)

[Log out](#)

Pay by bank transfer

You can pay your single contribution by bank transfer using the instructions below.

Bank transfer details	
Total payment due	£1,111.00
Payee name	Waystone Financial Investments Limited Client Account
Sort code	20-67-59
Account number	53186652
Name of payee bank	Barclays Bank Plc
Address of payee bank	50 Pall Mall, London, SW1Y 5AX
Swift code	BARCGB22
Payment reference	FD-020219E783

[Next](#)

Single payment pending

 **Single contribution payment to be made**

Amount **£1,111.00**

Payment reference **FD-610D36F30D**

What happens next?

Your single contribution

Please arrange payment of your single contribution with your bank and ensure the Reference number quoted below is included when the payment is sent. Failure to include this Reference number may result in a delay to the money being invested in your Prudential ISA. Payment for the full amount in respect of this application must be made within the next 30 days or you may be required to submit a new application.

Our bank details are:

Account name	Link Asset Services
Account number	87854321
Sort code	98-76-54
Ref	FD-610D36F30D
Amount to pay	£1,111.00

Once we've received the full amount we'll complete the investment and send you an email to let you know. To avoid any delay, where possible you should send one payment for the full amount.

[To dashboard](#)

The 'What happens next?' page will display 'Single payment pending', and detail the bank details to transfer the money to.

1.13 MAKE PAYMENT – REGULAR MONTHLY CONTRIBUTION

If you have set up a regular monthly contribution, you will be asked to review and confirm your bank details in order to set up the direct debit.

There are two checkboxes you must tick which confirm that the bank details are correct and that you are the account holder of the valid UK bank account.




[My dashboard](#)
[My documents](#)
[My account](#)
[Contact details](#)
[Help & support](#)

[Log out](#)

[Dashboard](#) > [Before you start](#) > [Money in](#) > [Investments](#) > [Summary](#) > [Direct debit guarantee](#)

Set up your direct debit

Confirm your bank details

You need to check the bank account details that you provided earlier. We need this to set up the direct debit for your regular contribution.

We'll save a copy of this application in your document store for future reference. If you wish to cancel or amend this application or something isn't right, you can contact our Customer Service Centre on 0344 335 6636.

Bank name	example
Account type	Bank account
Name on account	example
Sort code	00-00-00
Account number	12345678

Please check the details you have provided are correct and confirm by selecting the Tick Box

I hold a valid UK Bank/Building society account and I am the account holder and therefore the payer, and I am the only person required to authorise direct debits on the account.

Your direct debit instruction will be confirmed to you by email within 5 working days prior to the first collection. The company which will appear on your Bank Statement against the Direct Debit will be Waystone Financial Investments Limited.

Direct Debit Guarantee

The Direct Debit Scheme is protected by the Direct Debit Guarantee. Here is a copy for your records.

The Direct Debit Guarantee

- The Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Waystone Financial Investments Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Waystone Financial Investments Limited to collect a payment confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Waystone Financial Investments Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
 - If you receive a refund you are not entitled to, you must pay it back when Waystone Financial Investments Limited asks you to.
- you can cancel a Direct Debit at any time by simply contacting your bank or building society, written confirmation may be required. Please also notify us.



Print direct debit guarantee

Back

Next

Further down, the page displays the Direct Debit Guarantee, with an option for you to print this for your records.

Press 'Next' button to confirm your bank details and set up the direct debit.



[My dashboard](#) [My documents](#) [My account](#) [Contact details](#) [Help & support](#)

[Log out](#)

Direct debit successful

 Bank details for Direct Debit confirmed

Amount £100.00

What happens next?

Your regular contribution

We have contacted your bank in order to set up a Direct Debit. Your first payment of £100.00 will be collected on 06/12/2024.

[To dashboard](#)

1.14 HOW DO I UPLOAD EVIDENCE SO YOU CAN VERIFY MY NEW BANK ACCOUNT?

We need to verify the bank details you've provided. To do this, you'll need to provide a bank statement dated within the last three months, or a void cheque.

It's important you promptly provide evidence for the new bank account you've added, as it may delay the setup of your regular contribution. You can provide this evidence by uploading it using the 'Upload document' facility.

Once you have submitted the application, the 'What happens next?' page will provide information of what you need to do to upload your evidence.



Payment and direct debit successful

 **Payment successful**

Amount £1,000.00

Payment reference FD-393CC49B0B

 **Bank details for Direct Debit confirmed**

Amount £100.00

What happens next?

Your regular contribution

We have contacted your bank in order to set up a Direct Debit. Your first payment of £100.00 will be collected on 04/12/2024.

In order to complete the set-up of your regular contribution, we need to verify your bank details. To do this, you'll need to provide a bank statement dated within the last three months, or a void cheque.

It's important you provide this evidence as it may delay the setup of your regular contribution. You can provide this evidence by uploading it using the 'Upload document' facility below.

[Upload document](#)

If you are having any difficulty uploading your evidence, you can contact us to discuss alternative ways of verifying your bank account. You can reach our Customer Service team via email at prudential@waystone.com. You can also call on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays).

Your single contribution

Your payment has now been made for your single contribution. We've sent you an email to confirm this.

The application for your Prudential ISA will be processed. You'll receive confirmation by email when it's complete.

If you have a financial adviser we will be sending them an email to let them know you submitted an application.

[To dashboard](#)

There is an 'Upload document' button, allowing you to browse your documents on your computer to select the relevant file.

Direct debit successful

✓ Bank details for Direct Debit confirmed

Upload document



We are able to accept the following file type(s): PDF, JPG and PNG

Document type

Bank account evidence

Choose file

Browse

Upload

What happens next?

Your regular contribution

We have contacted your bank in order to set up your regular contribution. Evidence has been collected on 17/12/2024.

In order to complete the set-up of your regular contribution, you'll need to provide a bank statement dated within the last 3 months.

It's important you provide this evidence as it may be required to verify your bank account. You can provide this evidence by uploading it using the 'Upload document' button below.

[Upload document](#)

If you are having any difficulty uploading your evidence, you can contact us to discuss alternative ways of verifying your bank account. You can reach our Customer Service team via email at prudential@waystone.com. You can also call on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays).

[To dashboard](#)

Use the 'Upload' button to upload the document to the online service.

Direct debit successful

✓ Bank details for Direct Debit confirmed

Upload document

Capture.PNG has been successfully uploaded

Close

What happens next?

Your regular contribution

We have contacted your bank in order to set up a Direct Debit. Your first payment of £100.00 will be collected on 17/12/2024.

In order to complete the set-up of your regular contribution, we need to verify your bank details. To do this, you'll need to provide a bank statement dated within the last three months, or a void cheque.

It's important you provide this evidence as it may delay the setup of your regular contribution. You can provide this evidence by uploading it using the 'Upload document' facility below.

Upload document

If you are having any difficulty uploading your evidence, you can contact us to discuss alternative ways of verifying your bank account. You can reach our Customer Service team via email at prudential@waystone.com. You can also call on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays).

To dashboard

If you are unable to upload the document at the time of submitting the application, you can do this at any time by navigating to the 'Documents' section. The 'Upload document' button is located here for you to use when you are ready.



[My dashboard](#)

[My documents](#)

[My account](#)

[Contact details](#)

[Help & support](#)

[Log out](#)

Documents

Your documents

Below are all of the documents related to your account. If you need more information regarding any of these, please contact your adviser.

If you've provided new bank account details either by;

- updating these in the My details section, or
- when you submitted an application to add a new lump sum single contribution, added a regular contribution or requested a withdrawal.

You can use the Upload document option to upload a copy of a bank statement we requested as part of these processes, and must be dated within the last three months.

Successfully uploaded documents will be processed by Waystone Financial Investments Limited to verify your new bank details but will not display in Your documents.

[Upload document](#)

Show

- [All](#) [6m](#) [1y](#) [3y](#) [5y](#)

Date from

Date to

[Clear](#)

Type

- [All](#) [Contract note](#) [Income voucher](#) [Statement](#) [Correspondence](#) [Application Summary](#)

Date

Type

Sort by

Date: newest to oldest ▼

11/09/2024

Money In Application NFW



1.15 CAN I VIEW A SUMMARY OF THE APPLICATION I SUBMITTED?

Once your application has been submitted, you can navigate to the 'Documents' section.

My dashboard
My documents
My account
Contact details
Help & support

Log out

Documents

Your documents

Below are all of the documents related to your account. If you need more information regarding any of these, please contact your adviser.

If you've provided new bank account details either by:

- updating these in the My details section, or
- when you submitted an application to add a new lump sum single contribution, added a regular contribution or requested a withdrawal.

You can use the Upload document option to upload a copy of a bank statement we requested as part of these processes, and must be dated within the last three months.

Successfully uploaded documents will be processed by Waystone Financial Investments Limited to verify your new bank details but will not display in 'Your documents'.

Upload document

Show

All

6m

1y

3y

5y

Date from **Date to** Clear

Type

All

Contract note

Income voucher

Statement

Correspondence

Application Summary

Date	Type	Sort by
11/09/2024	Money In Application NCW PruSA_MoneyIn_251798_20240911_173843.pdf	Date: newest to oldest
11/09/2024	Money In Application NCW PruSA_MoneyIn_251798_20240911_173353.pdf	View
11/09/2024	Money In Application NCW PruSA_MoneyIn_251798_20240911_162737.pdf	View
11/09/2024	Money In Application NCW PruSA_MoneyIn_251798_20240911_162213.pdf	View
11/09/2024	Money In Application NCW PruSA_MoneyIn_251798_20240911_161744.pdf	View
11/09/2024	Money In Application NCW PruSA_MoneyIn_251798_20240911_161710.pdf	View
11/09/2024	Regular Saver Confirmation Letter NCW RegularSaverConfirmationLetter_251798_1106202415174 2.pdf	View
11/09/2024	Regular Saver Confirmation Letter NCW RegularSaverConfirmationLetter_251798_1106202415142 2.pdf	View
11/09/2024	Regular Saver Confirmation Letter NCW RegularSaverConfirmationLetter_251798_1106202415142 1.pdf	View
11/09/2024	Regular Saver Confirmation Letter NCW RegularSaverConfirmationLetter_251798_1106202415173 6.pdf	View

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The following summary details the information submitted by you, the investor, and forms the basis of a contract between you and Waystone Financial Investments Limited. If any of the information shown is incorrect please contact your adviser, and/or Waystone Financial Investments Limited, as soon as possible.

Application Type	Add Money In
Application Reference	FD-DF2C43DF8F
Submitted On	11/09/2024
Submitted By	251798/Miss CELIA NASH

CLIENT'S DETAILS

Personal Details	
Investor ID	251798
Title	Miss
First Name	CELIA
Model Name	Miss

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