

# Application form for Square Mile Managed Portfolio Service

The Managed Portfolio Service (as defined in the accompanying terms and conditions of business) (as may be amended from time to time) (the “Terms and Conditions”) is a service provided by Square Mile Investment Services Limited, a company authorised and regulated by the Financial Conduct Authority (“FCA”) under number 625562, Square Mile Investment Services Limited is a wholly owned subsidiary of Titan Wealth Holdings Limited. This is a service available to Professional Clients only, who are authorised by the FCA.

In applying for the Managed Portfolio Service you are confirming that:

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- 1.** you are a Professional Client and are authorised and regulated by the Financial Conduct Authority or an Appointed Representative of an Authorised Firm;

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  - 2.** you have read and understood the attached Terms and Conditions; and

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  - 3.** you agree to be bound by the Terms and Conditions.

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On receipt of this Managed Portfolio Service application, Square Mile Investment Services Limited will confirm in writing to you receipt and acceptance of your application and confirmation of when the provision of the service will commence. Square Mile reserves the right to reject any application at its discretion.

To apply for the Managed Portfolio Service please complete the details requested below and return this form to [operations@squaremilerresearch.com](mailto:operations@squaremilerresearch.com):

Details of Applicant Firm		
1	Name of Firm	
2	FCA Registration Number	
3	Firm's Main Address	
		Postcode
4	Name of Primary Contact	
5	Telephone Number of Primary Contact	
6	E-mail address of primary contact	
7	E- mail addresses of other firm employees who wish to receive Managed Portfolio Service communications direct	

## Platforms

	Sustainable MPS	Passive MPS
Abrdn		
Aegon Arc		
Aviva		
Fidelity		
Nucleus		
Quilter		
Transact		

## Fees and Payment

The fee for the provision of the Managed Portfolio Service shall be equal to the below basis points per annum of the cumulative value of assets (including cash) within which each Investor has invested in the Model Portfolios (such sum to accrue daily and be payable as set out in the Terms and Conditions):

Sustainable range - 21.00bps

Passive range – 15.00bps

## Authorisation and Signature

We hereby confirm that we wish Square Mile to provide the Managed Portfolio Service to us and that we:

1. are a Professional Client and are authorised and regulated by the Financial Conduct Authority or an Appointed Representative of an Authorised Firm;
2. have read and understood the attached Terms and Conditions; and
3. agree to be bound by the Terms and Conditions (as may be amended from time to time).

Signature: For and on behalf of the Applicant Firm

*(insert electronic signature or type your name)*

Print Name:

Date:

Square Mile Investment Services Limited is a wholly owned subsidiary of Titan Wealth Holdings Limited. Square Mile Investment Services Limited is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales (Company number 08743370) with registered address: 101 Wigmore Street, London, W1U 1QU.

