

COVID-19 UPDATE

ELECTRONIC PROCESSING

20 April 2020

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Due to the unprecedented environment resulting from the Covid-19 virus outbreak, Foresight has made some changes to the way we process applications and client requests, to ensure business continues to operate as smoothly as possible.

After Boris Johnson's announcement on 23 March 2020, Foresight has followed the Government's advice and all staff are working remotely and our Investor Relations, Client Onboarding and Sales teams can all be contacted, as normal, via telephone or email between 9am – 5.30pm each day (contact details below).

We would kindly ask that you refrain for the time being from sending anything via Post, to any of our offices, unless this has been agreed with a member of staff.

INVESTOR RELATIONS TEAM

InvestorRelations@ForesightGroup.eu
020 3667 8181

SALES TEAM

Sales@ForesightGroup.eu
020 3667 8199

CLIENT ONBOARDING TEAM

ClientOnboarding@ForesightGroup.eu
020 3667 8181

Please see below our processes for accepting electronic applications, payments and other client requests.

DIGITAL APPLICATIONS

To simplify the application process for advisers and their clients, Foresight will now be accepting electronic application forms for all of its tax products via DocuSign.

A DocuSign account is not needed to complete the application form electronically and client(s) can sign the application form on either a computer, smartphone or tablet.

If you, the adviser, would like to complete an application form electronically on behalf of your client(s) please follow this step-by-step process:

Step 1

Contact your local Foresight sales representative telling them that you would like to complete an electronic application form, providing them with the following details:

- The name of the product that your client is interested in applying for;
- The name and email address of the adviser; and
- The name and email address of the investor (if a joint application provide the name and email address for both applicants).

Step 2

Foresight, via DocuSign, will send the relevant electronic application form to the adviser's email address. The adviser will be able to key in the relevant fields and, if required, sign the document electronically.

Step 3

Upon the adviser completing the application form, the document will be sent to the investor(s) for their electronic signature(s).

Step 4

Once all the required parties have electronically signed the application form, the document will be sent automatically to Foresight's Client Onboarding Team for review. Please submit application monies as stated in the corresponding application form.

Step 5

Foresight's Client Onboarding Team will confirm with the adviser receipt of the application form.

PAYMENTS

We would kindly request that all payments are sent to Foresight electronically and not by cheque.

The details for bank transfers can be found in the relevant product's application pack, or if you are unsure, please contact one of the Foresight teams, who will be happy to assist.

We are aware that Banks often set daily transfer limits, meaning investors may need to make numerous transactions. Please ensure the correct payment reference is used for each transfer to ensure we can match these to applications.

Please note, during this period, sending cheques via post is at the client's own risk. Cheques are unlikely to be received until such time as our administration offices are able to open and therefore will not be banked.

CANCELLATION NOTICES

Should you wish to cancel your application, please complete your cancellation notice form within the 14-day period and email this to ClientOnboarding@ForesightGroup.eu.

IDENTIFICATION & OTHER SUPPORTING DOCUMENTATION

Foresight endeavours to complete all identification checks using online databases, however from time to time we may need to request that additional documentation is sent to us, to satisfy our Anti-Money Laundering requirements. Additionally, if a client is investing via a Trust or a Power of Attorney, we require sight of these documents too.

We are happy to accept scanned, certified copies, of the above-mentioned documentation and these can be sent to ClientOnboarding@ForesightGroup.eu.

TRANSFERS

All transfers can be submitted electronically. Please note, the form is still required to be signed and dated in person by the investor(s). Forms should be sent to InvestorRelations@ForesightGroup.eu for processing.

If the transfer request is made from the Executors of an Estate, we require to see a certified copy of the investor's death certificate and grant of probate. We can accept scanned copies of these documents, as long as they have been certified correctly. Please liaise with our Investor Relations team prior to sending these documents in.

REDEMPTIONS

All redemption requests can be submitted electronically. Forms should be sent to InvestorRelations@ForesightGroup.eu for processing.

Please note, if the redemption request is made from the Executors of an Estate, we require to see a certified copy of the investor's death certificate and grant of probate. We can accept scanned copies of these documents, as long as they have been certified correctly. Please liaise with our Investor Relations team prior to sending these documents in.

CUSTOMER SUPPORT

If you have any questions at all regarding the above guidance, please contact our Investor Relations team at InvestorRelations@ForesightGroup.eu or on 020 3667 8181 who will be more than happy to assist.

For further information, please contact:

[Investor Relations](mailto:investorrelations@foresightgroup.eu)

investorrelations@foresightgroup.eu

+44 (0)20 3667 8181

Foresight
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Foresight Group LLP

The Shard

32 London Bridge Street

London

SE1 9SG

www.foresightgroup.eu