Client Categorisation

From **Monday 26 June 2017**, if you choose to open an account in a new registered name, and the Fund Group permits this to be completed by telephone, you will be asked to confirm your client category.

Below is a list of client categories, which will also be replicated in the Fund Group application forms:

Club or Society	Regulated Occ. Pension
Incorporated Regist. Charity	Regulated Pers. Pension
Independent School/University	Sovereign Wealth Fund
Lawyer/Accountant/Professional	Subject to Statutory Licensing
Local Authority Pension Scheme	Trust
Nominee Parent	UK and EEA Regulated Firm
Parochial Church Council	UK Church or Place of Worship
Partnership / Unincorporated	Unincorporated Regist. Charity
Person	Unregistered Charity
Private Corporate	Unregulated UK & Irish Pension
Public Limited Company	
Public Sector/Local Authority	

Please ensure you have this information before contacting Distributor Client Services.

Note, if you need to check application requirements or acceptable instruction methods, please view the Fund Group pages on the IFDS Portal.