



Investment Club Representative Agreement

About your Club

Club Name

Portfolio Number* / /

***If existing, your Investment Club Portfolio Number must be entered.**

Investment Club Representative Agreement

Note: No more than 20 people may sign this form. Please write clearly in block capitals. Please note that all fields are mandatory and must be completed to allow us to act on your instructions.

Representative 1

Name

Nationality

Date of Birth / /

Signed

Address

Postcode

Country of residence

Email

Members

Title

Name

Nationality

Date of Birth / /

Signed

Address

Postcode

Country of residence

Email

Title

Name

Nationality

Date of Birth / /

Signed

Address

Postcode

Country of residence

Email

Title

Name

Nationality

Date of Birth / /

Signed

Address

Postcode

Country of residence

Email

Representative 2

Name

Nationality

Date of Birth / /

Signed

Address

Postcode

Country of residence

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Title

Name

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Name

Nationality

Date of Birth

Signed

Address

Country of residence

Email

The following should be read together with the Barclays Wealth Terms and Conditions and the Barclays Stockbrokers Additional Terms. In the event of any inconsistencies, these terms will prevail.

1. You may apply for an Investment Club account with Barclays Stockbrokers Limited by completing and returning to us this Representative Agreement form signed by all members of the Club and the Investment Club Application Form signed by your appointed Representatives. You may not apply via email or telephone. For the avoidance of doubt, clause 3 of the Barclays Stockbrokers Terms will not apply.
2. You, the members of the Club, hereby appoint two Representatives (as named on this form) to represent and act on behalf of the Club, who will have the authority of each member to do so.
3. We, Barclays Stockbrokers Limited, will only act upon instructions received from the appointed Representatives and our obligations will be fully discharged by acting in accordance with those instructions. We recommend that the Club is properly constituted and that the members enter into an agreement governing their membership rights and obligations. In the event of a dispute between Club members, Barclays Stockbrokers Limited accepts no liability and will be unable to adjudicate as to the entitlements of any individual Club member.
4. You may change your appointed Representatives at any time by sending us a letter of resignation from the Representative who is resigning and an Investment Club New Representative Form signed by all members of the Club.
5. You may add new members to your Club at any time by sending us an Investment Club New Member Form signed by both Representatives and the new member(s).
6. Where a member leaves the Club, either Representative should notify Barclays Stockbrokers in writing. The withdrawal of that member's funds will be governed entirely by the Club's rules or constitutional agreement; Barclays Stockbrokers will only accept instructions to transfer cash from the appointed Representatives.
7. In the event that a Representative dies, or cannot continue to act for any other reason, this Representative Agreement will continue to apply between Barclays Stockbrokers Limited and the Club. The Club must appoint a replacement for that Representative only by sending us an Investment Club New Representative Form signed by all remaining members of the Club. Until we receive such notification, Barclays Stockbrokers may continue to accept dealing or corporate action instructions from the remaining Representative and will continue to send all correspondence to the first Representative named on this form. Barclays Stockbrokers will not be able to carry out any instruction which requires the signature of both Representatives until a new Representative is appointed in accordance with this clause.
8. The Representative Agreement may be ended at any time by providing written notice to us signed by both Representatives. The Representative Agreement will remain in force until we receive such notice or until terminated by Barclays Stockbrokers in accordance with the Barclays Wealth Terms.

Note: no more than 20 people may sign the Representative Agreement. Where the Club has more than 20 members, we will accept more than one Representative Agreement Form. The two appointed Representatives must sign each separate Representative Agreement Form.

This Representative Agreement is between the members and appointed Representatives of the Investment Club (please print the Club's name below)

with effect from / /
until further notice.

Declaration and authority

You, the members, agree that the appointed Representatives will have the authority and responsibility to carry out the following duties on behalf of the Club:

1. Both Representatives will sign the Investment Club Application Form binding the members of the Club to the Agreement as defined in the Barclays Wealth Terms and Conditions.
2. Either Representative may place a dealing or corporate action instruction. You understand that when an instruction is given, Barclays Stockbrokers will assume the instruction has been authorised by the Club.
3. Act for the mutual benefit and interest of the Club. The Representatives will not receive payment from Barclays Stockbrokers Limited, or any of its agents, for acting on the Club's behalf.
4. The first named Representative will receive all correspondence from Barclays Stockbrokers Limited to the Club. However, Barclays Stockbrokers Limited will need written instructions signed by both Representatives to change the correspondence address.
5. Both Representatives will be responsible for opening a UK Bank or building society account in the Club's name (the Club's "Chosen Account"), for which they will both be signatories. If the Club decides to change the Chosen Account, Barclays Stockbrokers will need written instructions signed by both Representatives. Either Representative may transfer cash to/from the account and the Club's Chosen Account.

You agree:

- (a) to be bound by the Barclays Wealth Terms and Conditions and the Barclays Stockbrokers Additional Terms; and
- (b) that we, Barclays Stockbrokers Limited:
 - (i) may make credit reference, identity, fraud, money laundering and other enquiries and searches;
 - (ii) may disclose full account information to credit reference agencies, fraud prevention agencies and insurance companies. You understand that credit reference agencies will maintain a record of our searches and the information we give them, and if you give us false or inaccurate information or we suspect fraud we will record this with fraud prevention agencies. The records and information may be used by insurers, other lenders and other organisations to make assessments for credit and to help make decisions on you or other members of your household on credit, motor, household, life and other insurance facilities (including handling any claims), for debt tracing and to prevent fraud and money laundering.

Once completed, please send this form to:

Barclays Stockbrokers Limited, New Business Department, Tay House, FREEPOST (KE2462), Glasgow G2 4BR.

Please note that records held by credit reference agencies may be linked to records about persons financially associated with you. Your application may be assessed by reference to any of these “associated” records; and (iii) may collect and use information about you as set out in Paragraph 30 of the Barclays Wealth Terms and Conditions including: processing information about how you use and manage your accounts (e.g. transactions made); use information supplied by you to inform you about products and services which may be of interest to you; the circumstances in which we will disclose your information to other people including regulatory authorities; use your information relating to medical, health, lifestyle, ethnic background and criminal offences alleged or otherwise for purposes of administration and product or service identification; and the transfer of your information within the Barclays Group or to service providers located in other countries.

**You understand that you can request not to receive details of other products or services that may be of interest to you by writing, quoting your account number(s), to:
Barclays Stockbrokers Limited, Tay House, 300 Bath Street,
Glasgow G2 4LH.**

To receive details of those fraud prevention agencies from whom we obtain and with whom we record information about you, contact us on the Barclays Information Line on 0800 400 100. Lines are open from 7am to 11pm UK time. If calling from outside the UK, please call +44 (0)247 6842 100.

Under Data Protection legislation, you have a right of access to certain personal records. Should you wish to exercise this right, please write to our Data Protection Co-ordinator. Where permissible, a fee will be charged for this service.

Telephone calls may be recorded and monitored to maintain high quality service standards, to check instructions and for your and our protection.

We are committed to providing equal access to our services for all customers with disabilities. Full details of Barclays services and facilities can be found in our brochure “Disabled customers – making our services available”. All of our literature can be provided in Braille, large print or audio tape on request, within a reasonable timescale, by calling 0845 601 7788* (via TextDirect if appropriate).

Lines are open (excluding bank holidays) from 7.30am to 8.30pm Monday to Thursday, from 7.30am to 6pm Friday and from 9am to 2pm on Saturday. Calls made to 0845 numbers are free for BT residential customers (current as at February 2009). The price on non-BT phone lines may vary; please check with your service provider. You can only use these numbers if you are calling from the UK. If calling from outside the UK, please call +44 141 352 3947. Calls may be recorded to monitor the quality of our service, to check instructions and for security purposes.

Barclays Stockbrokers is the group name for the businesses of: Barclays Stockbrokers Limited, a member of the London Stock Exchange and PLUS. Registered No. 1986161; Barclays Sharedealing, Registered No. 2092410; and Barclays Bank Trust Company Limited, Registered No. 920880. All companies are registered in England and the registered address is: 1 Churchill Place, London E14 5HP. All companies are authorised and regulated by the Financial Services Authority.

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