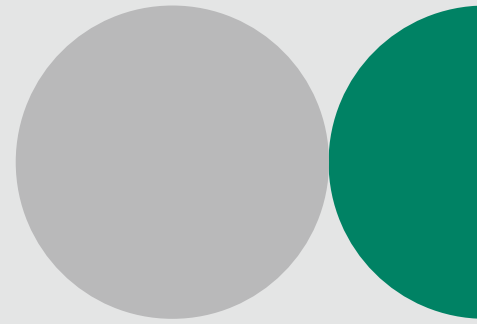


Anti-Money Laundering Compliance Form

Elevate



For Elevate clients the form can be returned either by uploading it onto the document library or by post at abrDN, PO Box 6877, Basingstoke, RG24 4RT, United Kingdom

Please refer to the Supplementary Guidance document at abrDN.com/library/aml-form-supplementary-guidance.pdf when completing the form by hand.

PART 1 - Client information

1.1 Elevate Account Number

NOTE: Please ensure you provide the relevant account number above so we can update the client's details accordingly. Without this critical piece of information, the form will be rejected as we will not be able to match to the client's account on the platform.

1.2 Client full name

PART 2 - Client personal details

Nationality: Complete only if the client is a non-UK national OR holds dual nationality.

2.1 Primary Nationality

2.2 Dual Nationality (If applicable)

Employment: Provide information about the clients' employment status, occupation, and role.

2.3 Employment Status

2.4 Employment Role

If 'Other' is selected please confirm Employment Role

2.5 Occupation Industry

If 'Other' is selected please confirm Occupation Industry

PART 3 - Source of Funds (SoF) and Source of Wealth (SoW)

Source of Funds: Provide the source of funds from which the money has been obtained. This is not the bank account where the money has come from.

Source of Wealth: Specify the origin of the accumulated funds.

3.1 SoF Primary Origin

SoF Secondary Origin
(If applicable)

3.2 SoW Primary Origin

SoW Secondary Origin
(If applicable)

Please only complete if any part of the SoF/SoW originates from a source outside of the UK.

3.3 Country

3.4 Additional Countries (if applicable)



For more information visit abrdn.com/adviser

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