



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

Please refer to the Supplementary Guidance document at [aberdeenadviser.com/library/aml-form-supplementary-guidance.pdf](http://aberdeenadviser.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). Please complete both SoF & 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.

3.1 SoF Primary Origin  SoF Secondary Origin (if applicable)

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

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)



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