

Change of personal details

Did you know? You or your financial adviser might be able to give your instructions online or by telephone.

This means that you will not need to complete this form - see 'Giving us your instructions' below.

With this form you can:

- advise us of a change of name, address, telephone number or email address
- provide your National Insurance Number, if not already provided.

This form cannot be used for:

- changing the 'Registered Contact' on a JISA (for which there is a separate form)
- changing trustees on a trust account
- changing your online password and memorable picture/phrase - these can only be changed online
- changing your correspondence preference (ie online or paper) - this can only be done online.

We regularly update our forms; you or your financial adviser can confirm that this **December 2025** version is the latest by checking our website quilter.com



Completing this form (if you cannot give your instructions online)

- Option 1 (electronic):** Save the form to your desktop, open it in **Adobe Acrobat** to complete the editable fields, then print and sign it with a 'wet' signature (not a digital signature).
- Option 2 (by hand):** Print the form and complete it in BLOCK CAPITALS using blue or black ink.
- Date Format:** please use **DD/MM/YYYY**.
- Complete the details carefully; we cannot be held responsible for any consequences if they are incorrect.
- We will need to see evidence to support some types of change - details are on page 2.**



Giving us your instructions

- Online:** You can make the following updates online, without completing this form:
 - your UK address, telephone number, email address.Speak to your financial adviser or log in to our online Customer Centre at quilter.com
- Telephone:** After completing security verification, we can update the following details over the phone:
 - your UK address, telephone number, email address.Call us on **0808 171 2626**.
- Post:** Send your completed form to Quilter, SUNDERLAND, SR43 4JP.
- Email:** see below (this option is not available if you are updating to an address outside of the UK)

Send your scanned form* to us via PROMPT, our tool for uploading documents direct to us.

- Advisers, visit: quilter.com/Adviser-Prompt
- Customers, visit: quilter.com/Customer-Prompt



OR

Send your scanned form* securely by email to:

ask@quilter.com



*Before sending any supporting documents to us, please refer to our guide about which documents must be certified as true copies and who can certify them. The guide is available via your PROMPT link above.





Additional documents we will need

Proof of new name

How your name has changed	Document(s) we will need
Change of name through marriage or civil partnership	Marriage/civil partnership certificate
Reverting to your maiden name, eg after divorce or ending your civil partnership	Final order (formerly known as decree absolute), marriage/civil partnership certificate and birth certificate
Change of name through deed poll	Deed poll
Change of company name	A Certificate of Incorporation on Change of Name, a photocopy is acceptable

Tax declaration

You must complete a **Tax Declaration** if there has been a change to the country(ies) in which you are deemed a national, citizen or tax resident.

- If your account(s) with us is in your name as an individual, you must complete and return the **Tax Declaration for Individuals**.
- For accounts held in the name of an entity (eg a trust or company), you must complete and return our **Tax Declaration for Entities**.
- You can get the tax declarations from your financial adviser, from our website quilter.com or by calling us on **0808 171 2626**.

1. Your existing details

Title	Mr	Mrs	Miss	Ms	Other ► Please specify		
First name(s)							
Surname/company/trust name							
Date of birth							
Existing residential/registered office address						Postcode	
Customer Reference Number	A	C					► The instructions will be applied to all investments held under this Customer Reference Number.

2. Your new details

Title	Mr	Mrs	Miss	Ms	Other ► Please specify	
First name(s)						
Surname/company/trust name						
Permanent residential/registered office address*						Postcode
► We cannot accept addresses that are 'care of', contain a PO Box number, or belong to your financial adviser.						
National Insurance number						
Telephone number				Email		
Correspondence address* (if different from above)				Postcode		
► We cannot accept a correspondence address that belongs to your financial adviser.						

* If there is not enough space to enter your address, above, please use the space at the end of the form.



- If your new address is outside of the UK, your completed form must be sent to us by post.
- If you are now a national, citizen or tax resident in a country other than, or in addition to, the UK, you must also complete and send us a completed Tax Declaration; see above.
- If you are a US citizen or US resident for tax purposes, you will be unable to invest in an ISA, or a Collective Investment Account (CIA).
- If you are a citizen of Russia or Belarus, you will be unable to invest in an ISA, Collective Investment Account (CIA), Collective Retirement Account (CRA) or A Collective Investment Bond (CIB).

3. Declaration and authority

► References to Quilter mean Quilter Life & Pensions Limited or Quilter Investment Platform Limited.

- a) I authorise and request Quilter to carry out the instructions detailed in this form, for all of my investments under the Customer Reference Number given in section 1.
- b) I understand that these changes will take effect in accordance with the account Terms and Conditions.
- c) I understand that Quilter may need to contact me for additional information if required.
- d) I declare that this form has been completed correctly to the best of my knowledge and belief.
- e) Where there has been a change in the country of which I am a citizen/national or tax resident, I have included a Tax Declaration with this instruction. I understand that failure to provide a tax declaration may delay my instruction and cause the account to become reportable.



- **If you are changing your name**, please sign once with your former signature and once with your new signature, clarifying which is which.
- **If the account holder is a company or trust**, this section must be signed by the authorised signatories.
- **Please use 'wet' signatures**; we cannot accept digital signatures on this form.

Signature

Date

Print full name

Capacity*

* eg investor, trustee, signatory

► If there are more than four signatories, please copy and complete this page with the additional details and attach it to your form.



Meeting your needs

- If you need documents in another format, or if there's anything else we can do to support you that we have not already discussed with you, please complete our 'Meeting your needs' online form.
- It only takes a few minutes and helps us tailor our services to suit you.
- You can find it on our website by visiting quilter.com/meeting-your-needs.



quilter.com

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years. Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

Registered Office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB, United Kingdom. Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority. Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Their Financial Services register numbers are 165359 and 207977 respectively. VAT number 386 1301 59.