Family Linking request

– To be completed with a financial adviser

With this form you can:

- ☑ link family investments that have the same financial adviser, to reduce the Charge Basis 3 Product/Service Charge.

Please do not use this form:

- ☒ to link a child's CRA or JISA to the registered contact/guardian - they're linked automatically
- ☒ to request Family Linking if your client only has Charge Basis 1 or 2 investments.
  - *When you request to link investments on Charge Basis 3 to investments on Charge Basis 1 or 2, the Charge Basis 3 investment will benefit from the combined value of all of those investments for Family Linking, but the Investor Charge on the Charge Basis 1 or 2 investment will be unaffected.*

We regularly update our forms; you can confirm that this **January 2026** version is the latest by checking our website ***quilter.com.***

How to complete your form

- **Option 1 (electronic):** Save the form to your desktop, open it in **Adobe Acrobat** to complete the editable fields, then either print and sign it, or sign it digitally.
- **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.**

How to send us your form

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

Visit: ***quilter.com/Adviser-Prompt***

OR

Send your scanned form securely by email to:

ask@quilter.com

Alternatively, you can send your form by post to: Quilter, SUNDERLAND, SR43 4JP.

Which family members and investments are eligible for Family Linking?

Individuals - The following family members of the investor named in section 1: *(complete their details in section 2A)*

- ☑ Spouse/Civil partner
- ☑ Grandchild
- ☑ Child, step-child or child-in-law
- ☑ Sibling
- ☑ Grandparent
- ☑ Parent, step-parent, or parent in-law

Other investments – You can also link the following types of investment: *(complete the details in section 2B)*

▶ *Where we say 'family members' below, we mean any family member shown in the list above.*

- ☑ A trust, if the investor or their family member is the settlor of the trust.
- ☑ A Self Invested Personal Pension (SIPP) investing in a Collective Investment Account (CIA) if the investor or their family member is a member of the SIPP.
- ☑ A CIA held within an offshore bond, if the investor or their family member is the bond holder or settlor of the bond held in trust.
- ☑ A shareholder of a company investing through a CIA or CashHub account (CHB) (where all other shareholders are family members).

How does the Family Linking benefit work?

- The Product/Service Charge rate decreases as the total value of an investor's assets grows. When investments are linked, we combine the value of all linked investments to work out the charge each linked investor pays.
- The Product/Service Charge only applies to investments on Charge Basis 3. However, we include the value of any linked investments on Charge Basis 1 and 2, and savings in the CashHub (powered by Bondsmith), when calculating the total value used to reduce the charge rate.
- Linking Charge Basis 1 and 2 investments does not convert them to Charge Basis 3 and they will remain subject to the Investor Charge.
- Once we accept the Family Linking request, we'll link all eligible investors listed, usually within 10 working days. Please ensure the Customer References are correct, or we won't be able to process the request.
- We will update the platform so that financial advisers can check that the Family Linking request has been carried out. An investor's regular statement will also show the number of linked investments.
- Linked family members may not ask for, or receive, details about the linked investments. However, illustration documents will show the total value of linked assets, which is necessary for calculating and displaying applicable charges. For more information, please see the declaration and notes in section 3.
- **Please note:** for new investments made under a new Customer Reference Number (eg a new SIPP with the client as the SIPP member), you will need to send a new Family Linking request to link the new investment to the investor's existing investments.

1. Investor details

Investor's full name*			
Date of birth		Customer Reference**	A C

If the main investor link is via a child's CRA or JISA please give the child's details above, then the name of the registered contact/legal guardian below.

Registered contact/ legal guardian	

*** If the investor has more than one Customer Reference, please give details of all that are to be linked.*

2. Investments to be linked

- **Customer References**
  - The Customer References in this section will be linked to each other, where eligible, not just to the investor named in section 1.
  - **If the investor has more than one Customer Reference, please give details of all that are to be linked.**
  - If no assets are held under a Customer Reference given, it cannot be linked. If there are still no assets under the Customer Reference after three months, we reserve the right to disregard the instruction.
- Additional Family Linking requests can be submitted when other family members become investors, if required.

2A Individuals

Complete this section with details of the individuals to be linked, including their relationship to the investor named in section 1. ▶ *If there are more than five, please use a copy of this page to provide the same information for each additional individual.*

Full name

Date of birth | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Full name

Date of birth | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Full name

Date of birth | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Full name

Date of birth | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Full name

Date of birth | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

2B Other investments to be linked

Complete this section with details of other investments to be linked, including:

- The name of the investor (eg the SIPP, trust etc, as applicable)
- The underlying investor* and
- Their relationship with the investor named in section 1.

▶ *If there are more than five, please use a copy of this page to provide the same information for each additional one.*

Investor name

Underlying investor | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Investor name

Underlying investor | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Investor name

Underlying investor | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Investor name

Underlying investor | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

Investor name

Underlying investor | Customer Reference A C

Relationship ○ Spouse ○ Child ○ Parent ○ Sibling ○ Grandparent ○ Grandchild

** For the purposes of this form, underlying investor means:*

- *Sole member of a SIPP investing through a CIA*
- *Settlor of a trust holding a CIA/CIB/CHB*
- *Policy holder of an offshore bond investing through a CIA*

3. Financial adviser's declaration and signature

a) I confirm that:

- as agent of the parties detailed in this form, I have authority to establish Family Linking between them
- I have verified that the parties meet the criteria specified for Family Linking

b) I have explained to each client that:

- once linked, the total value of all linked accounts will be used to calculate the Product/Service Charge on each account
- Quilter will not release information about the investments between individuals, but illustration documents will confirm the total value of linked assets so the applicable charges can be calculated and displayed
- linked investors may be able to make assumptions about the value of their family's accounts, based on changes to their own charges.

c) I understand that:

- links are only created between the investments detailed in this form and they do not cascade
- Quilter reserves the right to:
  - ask for evidence to support eligibility criteria and carry out any checks deemed necessary for this purpose
  - reject or remove the link between investors at any time.

Adviser's signature		Date	
Adviser's name *(print)*			
Adviser firm name *(if applicable)*			
Telephone		Email	

Reset

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