

Using the editable fields?

To ensure the information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.



Add or remove bank account details

- ISA, Collective Investment Account (CIA), Collective Investment Bond (CIB) and Collective Retirement Account (CRA)

Did you know? Your financial adviser can give your instructions online.

This means that you will not need to send us this form

With this form you can:

- ask us to add new bank account details*, or remove existing bank account details, from your investment records.

*We can hold details for up to four bank accounts under your customer reference number.

This form cannot be used for:

- changing the bank account from which Direct Debits are paid; for this you will need to complete a Direct Debit Instruction

- changing your nominated bank account used for CashHub savings

for which there are separate forms, available from your financial adviser.

We regularly update our forms; you or your financial adviser can confirm that this **December 2024** version is the latest by checking our website quilter.com.



How to complete your form

- You can complete the form electronically by using the editable fields, if preferred; save the form to your desktop before you do so, to ensure that the information is saved correctly. Then print, sign and send it to us.
- Alternatively, you can print and complete it by hand using **BLOCK CAPITALS** and **blue** or **black** ink.
- For dates, please use the format DD/MM/YYYY.
- Complete the details in each applicable section carefully; we cannot be held responsible for any consequences if they are incorrect.



Additional documents we will need

- We will need to see additional documents if you are providing new bank account details, and request a withdrawal payment into that account in the future. More information is in section 2.



How to send us your form

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.

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



4. Declaration and authority

a) I request Quilter to amend the records under my customer reference given in section 1, by:

- adding any bank details given in section 2
- removing any bank details given in section 3.

b) I understand that Quilter may need to contact me for additional information if required.

c) I declare that this form has been completed correctly to the best of my knowledge and belief.

All account holders including trustees and/or signatories (as applicable) **MUST SIGN BELOW**, even if a Lead Account Holder has been appointed.

► *If there is insufficient space for all signatures, please copy this page for the additional signatures and attach it to the form.*

Signature

Date

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Print full name

Capacity*

Signature

Date

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Print full name

Capacity*

Signature

Date

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Print full name

Capacity*

Signature

Date

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Print full name

Capacity*

Signature

Date

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Print full name

Capacity*

*eg account holder, attorney, trustee, signatory



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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.