

Power of Attorney details

- ISA, Collective Investment Account (CIA), Collective Investment Bond (CIB) and Collective Retirement Account (CRA)
- CashHub (CHB), powered by Bondsmith

With this form you can:

- provide details of an attorney
- verify the attorney's identity
- confirm the nature of the donor's incapacity (CRA and ISA).

Please note:

We can only accept an Enduring Power of Attorney, a Property & Financial Affairs Lasting Power of Attorney, a General Power of Attorney (CIB and CIA only) or a Scottish Continuing Power of Attorney.

Online access

- If the attorney wishes to access the donor's account(s) online, they can do so by registering for the online Customer Centre/Quilter app once the Power of Attorney has been noted on our records. They should register using their own details, not those of the donor, at customer.platform.quilter.com
- If the attorney has previously registered for online access to accounts held in their own name, accounts on which they are noted as attorney will automatically be added and can be accessed using their existing login details.

We regularly update our forms; your financial adviser can confirm that this **March 2026** version is the latest by checking our website quilter.com



Completing this form

- **Option 1 (electronic):** Save the form to your desktop, open it in **Adobe Acrobat** to complete the editable fields, then print and sign it.
- **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**.
- **Send the completed form and Power of Attorney document to: Quilter, SUNDERLAND, SR43 4JP.**



- Please attach with this form the original registered Power of Attorney, or a copy certified as a true copy of the original in ink on each page by a solicitor or the donor (ie the person giving the power). We will return the document by recorded delivery once the details are noted.
- Your financial adviser can send both this form and your Power of Attorney document to us electronically by email or PROMPT (our tool for uploading documents direct to us), without the need for it to be certified.

1. Account holder details

Title Mr Mrs Miss Ms Other ▶ *Please specify*

First name(s)

Surname

Permanent UK residential address

Postcode

Date of birth



2. Account details

Complete this section by ticking the products on which the Power of Attorney is to be noted, and give the Customer Reference Number under which they are held.

ISA

CIA

CRA

CIB

CHB

Customer Reference Number

A	C										
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3. Attorney details

3.1 We will need:

- the attorney's details below
- the original Power of Attorney, or a copy certified as outlined in the notes on page 1.
- the attorney's identity verified (see section 4).

► Where there is more than one attorney, please print and complete this section for each one and attach to this form

Full name/Company name

Full postal address

Postcode

Is correspondence for accounts listed in section 2 to be sent to this address in future?

Yes

No

Date of birth

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National Insurance number

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Nationality

► If not UK, we may need to ask for additional information

Company registration number

► If applicable

3.2 If an ISA or CRA is listed in section 2:

Under HMRC regulations, we can only accept an ISA or CRA application made under a Power of Attorney if we have confirmation that at least one of the following circumstances applies. Please tick to indicate why the investor is unable to act him/herself:

Physical disability, illness or old age

Mental disorder or incapacity

The investor is a member of the armed forces on active service in a war zone (acceptable for ISAs only).

3.3 Decision maker



- A 'decision maker' is the one making decisions concerning transactions on the investment.
- In most cases it will be the investor but sometimes other people could be authorised to make decisions.
- Where investments include a discretionary portfolio, the discretionary manager will automatically be reported as the decision maker for transactions involving those assets.
- However, if other assets are held, we need to record whether someone other than the investor is the decision maker.

General Power of Attorney – where an attorney has been appointed under a General Power of Attorney, the investor will be classed as the decision maker.

Lasting Power of Attorney (LPA) – where an attorney has been appointed under an LPA, we will assume that the decision maker for the investment is the attorney, **unless you advise us otherwise.**

3.4 Privacy information

I confirm that I have read Quilter's privacy notice available at [quilter.com/privacy](https://www.quilter.com/privacy) concerning use of my personal information.

3.5 Attorney's signature

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Date

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► If you sign any instructions on the donor's behalf, please add 'as attorney' after your signature

4. Proof of identity

Part A should be completed by the financial adviser, otherwise complete Part B.

Part A - Confirmation of Verification of Identity (CoVI) from the financial adviser



This section cannot be used to verify the identity of anyone who falls into one of the following categories:

- those who are exempt from verification as being an existing client of the introducing firm prior to the introduction of the requirement for such verification,
 - those who have been subject to Simplified Due Diligence under the Money Laundering Regulations, or
 - those whose identity has been verified using the source of funds as evidence.
- Evidence of identity must be provided to us for any such cases.

I confirm that:

- I have verified the identity of all relevant parties referred to in this form
 - the information in this form was obtained by me in respect of the relevant parties
 - the evidence I have obtained to verify the identity of the relevant parties can be produced on demand and meets the standard of evidence set out within the guidance for the UK Financial Sector issued by the Joint Money Laundering Steering Group (JMLSG)
 - if any individual referred to in this form has changed address within the last three months, I can provide evidence on demand
 - I have not verified the identity of the following parties referred to in this form because they are exempt from verification under Money Laundering Regulations
- f) this section is signed below by the person who has seen the documentary evidence (which may include an electronic identity check).

Financial adviser's signature

Date

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Print name

Position

Full name of regulated firm
(or sole trader)

Financial Services
register number

Email address

Telephone number

OR

Part B - Proof of Identity enclosed

To meet our requirements under UK money laundering regulations, we need the attorney to provide a copy* of their current valid passport or photo driving licence (unless already provided for one of our platform products).

**The copy must be certified as a true copy by a financial adviser, bank or building society official, barrister, solicitor, doctor, or accountant. The person certifying the copy must write on it 'Certified as a true copy of an original seen by (print their name and title)' then they must sign and date the copy (with a company stamp where applicable).*

Tick the following to indicate the proof of identity being provided with this form:

Certified copy of passport

Certified copy of photo driving licence.



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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.

Bondsmith is a trading name of Bondsmith Savings Ltd, which provides the CashHub (CHB) distributed by Quilter Investment Platform Limited. Bondsmith Savings Ltd is registered in England and Wales, No 13223331. Registered office: 2nd Floor, 4 Pentonville Road, Angel, London, N1 9HF. Bondsmith is authorised by the Financial Conduct Authority, Firm Reference 955601.