

If your instruction has been submitted online:  
**You do not need to send this form to us**

## Direct Debit Amendment

- ISA, Junior ISA (JISA) or Collective Investment Account (CIA)

It's often quicker and easier to submit your instructions online




### 1. Confirm if your instruction can be given online

- Is the account an ISA or a CIA in your sole name?**  
▶ *ie not a JISA, not a CIA in joint names, and not in the name of a trust, company, club, charity or pension scheme*
- Is the Direct Debit paid by you, the ISA/CIA account holder (ie not paid by a third party)?**


*If you answer YES to those questions:*

### 2. Your request can be submitted online

 **Customers** access your online account via the Quilter app (available from your smartphone's app store), or via the online Customer Centre at [customer.platform.quilter.com](https://customer.platform.quilter.com)

If you haven't yet registered online, click 'Customer login' and 'Register' - it takes less than 7 minutes.

 **Advisers** log in to the platform at [adviser.platform.quilter.com](https://adviser.platform.quilter.com)

 Select the account

- **Advisers:** click 'Top up' and select 'Edit regular payments'
  - **Customers:** click 'Payments in' and select 'Edit'
- Then follow the instructions on screen

### 3. Complete & submit the request online instantly

*If you answer NO to either question:*

### 2. Complete this form.

### 3. Send it to us via email or post

**Email:** send your scanned copy via PROMPT, our tool for uploading documents direct to us:

- **For customers,**  
**Visit: [quilter.com/Customer-Prompt](https://quilter.com/Customer-Prompt)**
- **For advisers,**  
**Visit: [quilter.com/Adviser-Prompt](https://quilter.com/Adviser-Prompt)**

Or customers can send via email to:  
[ask@quilter.com](mailto:ask@quilter.com)

**Post:** send the completed form to:  
Quilter, SUNDERLAND, SR43 4JP.





# Direct Debit Amendment

- ISA, Junior ISA (JISA) or Collective Investment Account (CIA)

## With this form you can:

- change the Direct Debit amount, frequency and collection date for an existing regular investment on an ISA, a JISA or a CIA.

## It cannot be used:

- to redirect (change) the assets into which future Direct Debits are invested - please use our Switch/Redirection Request form
- to change the bank account from which your Direct Debits are being paid - please use the **Direct Debit Instruction** form
- to change the regular initial fee for your financial adviser – your adviser can do this for you.

We regularly update our forms; you or your financial adviser can confirm that this **April 2026** version is the latest by checking on our website [quilter.com](https://www.quilter.com)



## *How to complete your form (if you are unable to submit your request online)*

- **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**.
- Any third party paying the Direct Debit must complete section 7 Part B to authorise any changes.
- Missing or unclear information may result in delays. We are unable to correct errors or omissions retrospectively.



## *Timescales*

- Any changes in this form will take effect from your **next available Direct Debit collection date**.
- If we receive your instruction less than ten working days before your chosen collection date, we cannot guarantee that it will take effect from that date.



## *Giving us your instruction*

- Details about how to give us your instructions online, by email or post are on page 1.
- **Telephone:** alternatively, if you can answer 'yes' to the questions shown on page 1, you can also give your instructions by calling us on 0808 171 2626.



## 1. Financial advice

Have you received advice from your financial adviser in respect of this instruction?  Yes  No

## 2. Your details

Full name of investor

► For a JISA, enter the child's name.

Telephone number

Email

Full name of joint investor

► If applicable

Full name of registered contact

► JISA only

## 3. Your account details

Complete this section with the account number to which the Direct Debit changes relate:

ISA	JISA	CIA	Customer Reference						Account		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A	C	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 4. Payer details

Please tick to indicate who pays the Direct Debit payment you wish to amend.

- 4.1  Investor ► Direct Debits are paid from the investor's own bank account
- 4.2  Registered contact ► JISA only
- 4.3  Other third party ► Please state the third party's name. The third party will need to sign section 7, Part B

## 5. Direct Debit amendments

### Part A - Change the amount

New **TOTAL** Direct Debit amount

£

► Minimum monthly payment £99 (ISA/CIA), £50 (JISA);  
minimum yearly payment £600 (ISA/CIA) £300 (JISA)



– If you are decreasing the Direct Debit amount, any existing regular initial fees being paid to your financial adviser will continue at the current level, unless we are instructed otherwise.

### Part B - Change the frequency

Frequency

Monthly

Yearly

### Part C - Change the collection date

Next collection date

► Any day from 01–28, but not more than 13 months in the future

## 6. Stop Direct Debits

Tick here to stop the Direct Debit collections

► To start collections again you will need to complete a new ISA, JISA or CIA application, as applicable.

## 7. Declaration and authority

### Part A - Investor authority

This declaration is made by each account holder, authorised signatory or the JISA registered contact, as applicable.

- a) I authorise and request Quilter to carry out the instructions detailed in this form.
- b) I understand that these changes will take effect in accordance with the account Terms and Conditions.
- c) I confirm that I am authorised to give instructions for the account stated in section 3.
- d) I declare that this form has been completed correctly to the best of my knowledge and belief.

Where there is more than one account holder, or more than one person is required to authorise changes, each one must sign, even if a Lead Account Holder has been appointed.

► If there is not enough space for all signatures, please use a copy of this page and attach it to this form.

Signature

Date

Print full name

Capacity \*

Signature

Date

Print full name

Capacity \*

Signature

Date

Print full name

Capacity \*

Signature

Date

Print full name

Capacity \*

\* eg investor, trustee, signatory, registered contact

### Part B - Third party authority

To be completed by the third party if 4.3 was completed in section 4.

- a) As payer of Direct Debits named in section 4.3, I agree to the change(s) requested in this form.
- b) I confirm that I have read Quilter's privacy notice, available at [quilter.com/privacy](https://quilter.com/privacy) concerning use of my personal information.

Signature

Date

Print full name

Company name

Capacity in which signing

► If applicable



[quilter.com](https://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).

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