

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

Direct Debit Amendment

- Collective Retirement Account (CRA)

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




1. Confirm if your instruction can be given online

Is the Direct Debit paid by you, the CRA account holder?


If you answer **YES** to the question above:

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

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

 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 the question above:

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
- **For advisers,**
Visit: quilter.com/Adviser-Prompt

Or customers can send via email to:
ask@quilter.com

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



Direct Debit Amendment

- *Collective Retirement Account (CRA)*

With this form you can:

- change the Direct Debit amount, frequency and collection date for an existing regular investment on a Collective Retirement Account (CRA).

This form cannot be used:

- to amend employer regular payments - please use the Employer Payer Declaration form
- 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** (other than your employer) 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 question shown on page 1, you can also give your instructions by calling us on 0808 171 2626.



– **This instruction could change the Charge Basis for your account** – see the Guidance Notes at the end of the form for more information.



1. Financial advice

Have you been given financial advice in respect of this instruction?

Yes

No

2. Your details

Full name

Telephone

Email

3. Your account details

CRA sub account number

Customer Reference										Account		
A	C											

4. Payer details

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



If Direct Debit payments are made by your employer, please do not complete this form; instead your employer will need to complete the Employer Payer Declaration form.

4.1 Investor *Direct Debits are paid from the investor's own bank account*

4.2 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 - NET £

Annual escalation*

No escalation (0%)

Average weekly earnings

* This is where Direct Debits can be increased automatically each year in line with Average Weekly Earnings. If left blank we will assume no escalation is required.

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 CRA application.

7. Declaration and authority



– **This instruction could change the Charge Basis for your account** – see the Guidance Notes at the end of the form for more information.

Part A - Investor authority

This declaration is made by the CRA account holder.

- I authorise and request Quilter to carry out the instructions detailed in this form.
- I understand that these changes will take effect in accordance with the CRA Terms and Conditions.
- I confirm that I am authorised to give instructions on the account stated in section 3.
- I declare that this form has been completed correctly to the best of my knowledge and belief.
- I understand that if this instruction converts my account to Charge Basis 2, all commission payments to my financial adviser will stop and the account cannot revert to Charge Basis 1.

Investor's signature

Date

Part B - Third party authority

To be completed by the third party if section 4.2 was completed.

- As payer of Direct Debits named in section 4.2, I agree to the change(s) requested in this form.
- I confirm that I have read Quilter's privacy notice, available at quilter.com/privacy concerning use of my personal information.

Third party's
signature

Date

Print full name

Company name

► *If applicable*

Capacity in
which signing



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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.

Guidance notes - for you to keep

This instruction could change the Charge Basis for your account.

Our three different charge bases are:

Charge Basis 1

This applies to CRAs that are subject to the Investor Charge and on which financial advisers are entitled to receive commission.

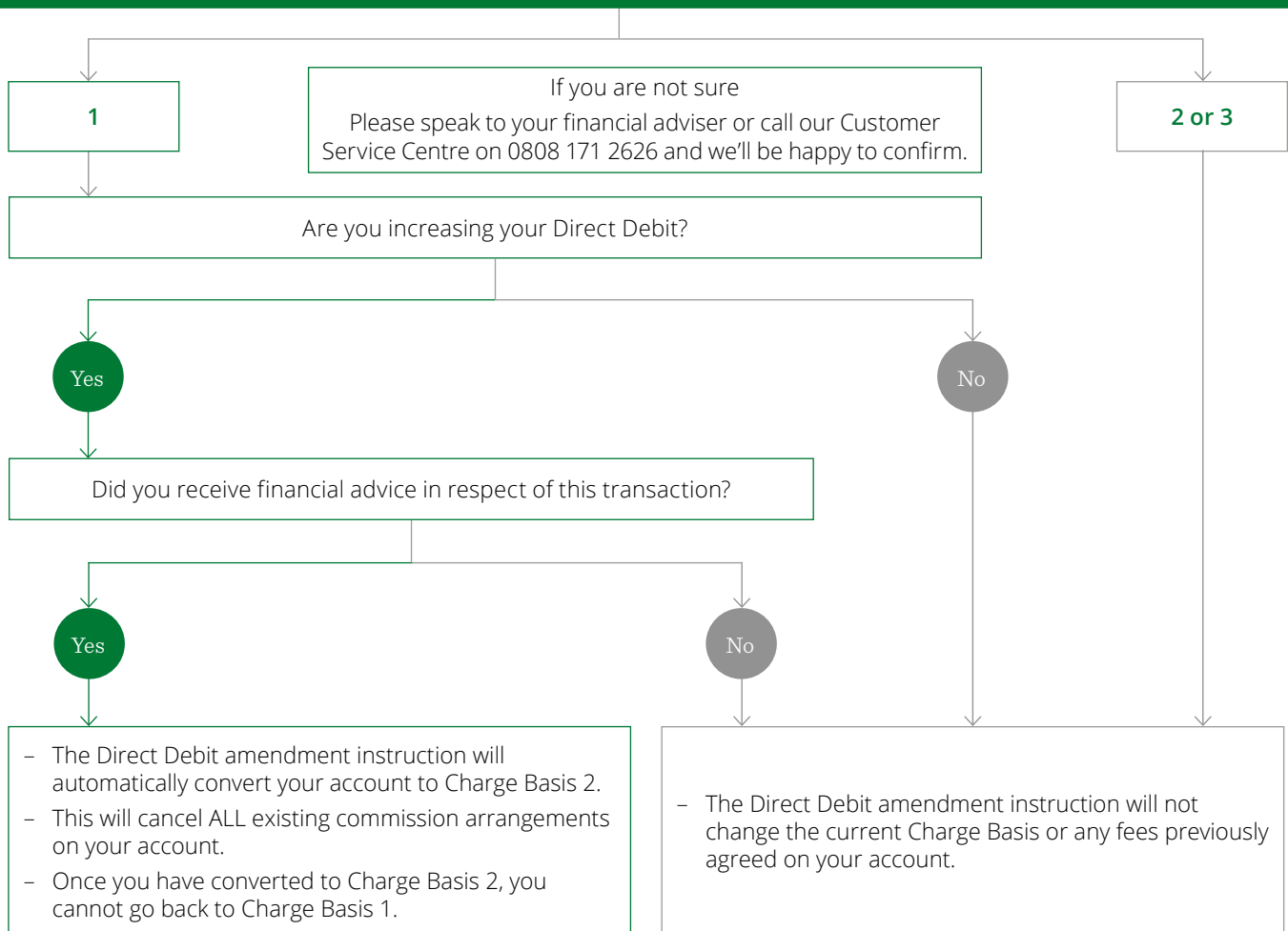
Charge Basis 2

This applies to CRAs that are subject to the Investor Charge and Adviser Charging, where financial advisers are paid by fees rather than commission.

Charge Basis 3

This applies to CRAs that are subject to the Product Charge and Adviser Charging, where financial advisers are paid by fees rather than commission.

What is your Charge Basis?



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