



Third party/Registered Contact (IISA)

Direct Debit Instruction

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

- 🗸 start a new Direct Debit for individual or third-party regular investments as part of an application for an ISA, a JISA or a CIA
- change bank details on an existing Direct Debit.

It cannot be used for:

Full name of the ISA, JISA or CIA investor

Tick to indicate the payer of the Direct Debit

x any other Direct Debit changes, please use our Direct Debit Amendment form.

We regularly update our forms; you or your financial adviser can confirm that this September 2025 version is the latest by checking our website quilter.com

Completing this form

- Please use BLOCK CAPITALS and blue or black ink. For dates, use the format DD/MM/YYYY.
- The collection date can be any day from 1-28; the first collection date cannot be more than 13 months in the future.
- If we receive your instruction less than 10 working days before the collection date requested, we cannot guarantee that it will take effect for that month.

ISA, JISA or CIA account number

- If you leave the collection date blank, we will use the next available collection date.
- We will complete the 'Reference' shown on the Direct Debit Instruction; please leave this blank.
- The instruction must be dated, and signed in accordance with the authorised signature(s) for the bank account.
- Privacy information a privacy notice is available on our website at quilter.com/privacy concerning use of personal data.
- Details for how to send us this form are shown overleaf.

First collection date	Frequency	Monthly	Annually		
()uilter Buil	RUCTION TO YOUR DING SOCIETY TO F IRECT DEBIT.			DIRECT	
Please complete the form and send it to:	Servio	e user number			
Quilter Investment Platform Limited	1 7	7 4 2 7 2			
SUNDERLAND, SR43 4JP. Name and full postal address of your bank or building society	Refere	ence			
To: The Manager					
bank/building society		Instruction to your bank or building society			
Address	Please the ac		nis Instruction subje	ed Direct Debits from ect to the safeguards	
Postcode	Lunde	erstand that this Ins	struction may remai		
Name(s) of account holder(s)	electr	Investment Platform Limited and, if so, details will be passed electronically to my bank/building society. Signature(s) Date			
	Signa	LUI E(3)	Date		
Bank/building society account number					

This Guarantee should be detached and retained by the payer.

The Direct Debit Guarantee.

- This Guarantee is offered by all banks and building societies that accept Instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Quilter Investment Platform Limited will notify
 you ten working days in advance of your account being debited or as otherwise agreed. If you request Quilter Investment Platform Limited to collect
 a payment, confirmation of the amount and the date will be given to you at the time of the request.

Banks and building societies may not accept Direct Debit Instructions for some types of account

- If an error is made in the payment of your Direct Debit, by Quilter Investment Platform Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Quilter Investment Platform Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



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

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



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).

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.

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