



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

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

Full name of the ISA, IISA or CIA investor

ISA, JISA or CIA account number

[illegible]

Tick to indicate the payer of the Direct Debit

Investor

Third party/Registered Contact (JISA)

First collection date

Frequency

Monthly

Annually



Name and full postal address of your bank or building society

To: The Manager	
	bank/building society
Address	
	Postcode

Name(s) of account holder(s)

Bank/building society account number

Branch sort code

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

Service user number

1	7	4	2	7	2
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## Reference

**Instruction to your bank or building society**

Please pay Quilter Investment Platform Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.


I understand that this Instruction may remain with Quilter Investment Platform Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date \_\_\_\_\_

**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.
  - 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.
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## 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](https://quilter.com/Adviser-Prompt)
- Customers, visit: [quilter.com/Customer-Prompt](https://quilter.com/Customer-Prompt)



OR

Send your scanned form securely by email to:

[ask@quilter.com](mailto: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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