

Using the editable fields?

To ensure the information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

Quilter

Appointment of a Lead CashHub Account Holder

– CashHub (CHB), powered by Bondsmith

With this form you can:

- ☒ appoint a 'Lead CashHub Account Holder'.

It cannot be used for:

- ☐ the Collective Investment Account or Collective Investment Bond, for which there is a separate form to appoint a Lead Account Holder, available from our website quilter.com



Important Information

Where you hold a CashHub account jointly, or as a Business Client (eg a company or trust), you must appoint a 'Lead CashHub Account Holder' who has the authority to provide online instructions for the account on behalf of all of the CashHub account holders.

We regularly update our documents; you or your financial adviser can confirm that this **December 2024** version is the latest by checking on our website quilter.com



Completing this form

- You can complete it electronically by using the editable fields, if preferred; save the form to your desktop before you do so, to ensure that your information is saved correctly. Then print, sign and send it to us.
- Alternatively, you can print and complete it by hand using **BLOCK CAPITALS** and **blue** or **black** ink.
- For dates, please use the format DD/MM/YYYY.
- Return the completed form to: **Quilter, SUNDERLAND, SR43 4JP.**

1. Details of the CashHub

	Customer reference		Account
CashHub account number	A C		

Complete Part A or B

Part A - account held in the names of individuals

Full names of each individual account holder

Part B - account held by a Business Client

Name of the Business Client (eg trust, company or charity name)

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Companies* – please attach a current signatory list.

Trusts* – please state the full names of the trustees below

* including charities dependent on their structure.



2. Lead CashHub Account Holder

Full name

Telephone number

Email

3. Online withdrawals

Tick here if you want to authorise the Lead CashHub Account Holder to request withdrawals, up to £75,000 to the Nominated Bank Account, from the CashHub using the online Customer Centre.

4. Appointment and authority

The following declarations are made by all account holders, trustees and authorised signatories for the account stated in section 1, including the nominated Lead CashHub Account Holder.

1. I, the account holder, appoint the person named in section 2 to act as the Lead CashHub Account Holder for the account detailed in section 1, in accordance with the CashHub account Terms and Conditions.
2. I confirm that this appointment revokes all previous appointments.
3. **Where this request is made on behalf of a trust**, I confirm that the provisions of the trust allow delegation of authority to the Lead CashHub Account Holder named in section 2 to act on behalf of all Trustees.
4. **Where this request is made on behalf of a corporate entity or partnership**, I confirm the Lead CashHub Account Holder named in section 2 has the appropriate authority to act on behalf of the corporate entity or partnership.
5. I understand that:
 - a) this appointment is revocable and can be changed at any time as explained in the CashHub account Terms and Conditions.
 - b) by agreeing to the appointment, I authorise the Lead CashHub Account Holder to provide Quilter with instructions to carry out certain transactions on behalf of all account holders and that the instruction shall be deemed to have been addressed, sent, and authorised by all account holders.
 - c) the appointment will be legally binding and that Bondsmith via Quilter can act on certain instructions received from the Lead CashHub Account Holder.
 - d) some instructions cannot be provided by the Lead CashHub Account Holder alone including, but not limited to, the following:
 - i. instructions to withdraw money from the CashHub account, unless section 3 has been completed allowing online withdrawal requests subject to the maximum withdrawal amount noted above
 - ii. instructions to change details of a trust, eg the retirement or removal of a trustee
 - iii. instructions to change the nominated bank account for the CashHub account
 - iv. instructions to appoint, change or remove an adviser firm and its associated financial advisers.
 - e) the appointment will:
 - i. remain in force until any account holders revoke it
 - ii. be revoked in some circumstances, including but not limited to, the following:
 - the death of the Lead CashHub Account Holder
 - the Lead CashHub Account Holder being declared bankrupt.

Quilter will not accept any further instructions through the online Customer Centre and will only accept instructions by post signed by all account holders until a replacement Lead CashHub Account Holder has been appointed by completion of a new form.

Use of the online Customer Centre:

6. I understand that:
 - a) to use the Quilter online Customer Centre I will need to register and accept the online Customer Centre Terms and Conditions
 - b) registering for the online Customer Centre will give me 'read only' access, unless I am the Lead CashHub Account Holder
 - c) the online Customer Centre Terms and Conditions override the Bondsmith CashHub terms where the Bondsmith CashHub terms are incompatible with the ability to access the online Customer Centre facilities.
7. I authorise the Lead CashHub Account Holder to carry out and authorise transactions using the online Customer Centre that would normally need my authority.

All account holders/authorised trustees/authorised signatories must sign below/overleaf.

Signature

Date

Print full name

Capacity*

Signature

Date

Print full name

Capacity*

Signature

Print full name

Date

Capacity*

Signature

Print full name

Date

Capacity*

Signature

Print full name

Date

Capacity*

Signature

Print full name

Date

Capacity*

**eg account holder, Lead CashHub Account Holder, trustee, signatory*

► *If there is insufficient space for all signatures, please copy this page for the additional signatures and attach it to the form.*



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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.

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: 124-128 City Road, London, EC1V 2NJ. Bondsmith is authorised by the Financial Conduct Authority, Firm Reference 955601.

Quilter is the trading name of Quilter Investment Platform Limited, which is registered in England and Wales under number 1680071. Registered Office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB, United Kingdom. Authorised and regulated by the Financial Conduct Authority. Financial Services register number 165359.

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