

Using the editable fields?

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

Change of personal details

Did you know? You or your financial adviser might be able to give your instructions online or by telephone.

This means that you will not need to complete this form - see 'Giving us your instructions' below.

With this form you can:

- advise us of a change of name, address, telephone number or email address
- provide your National Insurance Number, if not already provided.

This form cannot be used for:

- changing the 'Registered Contact' on a JISA (for which there is a separate form)
- changing trustees on a trust account
- changing your online password and memorable picture/phrase - these can only be changed online
- changing your correspondence preference (ie online or paper) - this can only be done online.

We regularly update our forms; your financial adviser can confirm that this **August 2023** version is the latest by checking our website [quilter.com](https://www.quilter.com)

Completing this form

- Tick/complete this form, as applicable, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- References in this form to Quilter mean Quilter Investment Platform Limited or Quilter Life & Pensions Limited.
- Complete the details in each applicable section carefully; we cannot be held responsible for any consequences if they are incorrect.

Additional documents we will need

Proof of new name

Please provide the following documents, as applicable.

- Change of name through marriage or civil partnership
 - marriage/civil partnership certificate
- Reverting to your maiden name, eg after divorce or ending your civil partnership
 - final order (formerly known as decree absolute), marriage/civil partnership certificate and birth certificate
- Change of name through deed poll
 - deed poll
- Change of company name
 - a Certificate of Incorporation on Change of Name, a photocopy is acceptable

Proof of new residential address

We may need to see proof of your residential address in the future, for instance before sending any payments to you. It could therefore avoid delays if you provide proof of your new address with this form.

- Acceptable documents for this purpose are:
 - a recent original bill showing the new address, eg phone, electricity, gas, water etc but not a mobile phone bill.

If you would like to discuss alternative evidence, please call **0808 171 2626** or email ask@quilter.com.

Giving us your instructions

- **Online:** we can accept the following changes online, which means you won't need to complete this form:
 - UK residential and UK correspondence address, your telephone number, your email address.

For online instructions, speak to your financial adviser or log in to our online Customer Centre at [quilter.com](https://www.quilter.com)

- **If you haven't yet registered:** click the 'Customer login' button, then click 'Register' and follow the instructions shown.
- **Email:** send your scanned copy* to ask@quilter.com or via PROMPT, our tool for uploading documents direct to us.
 - **For customers, visit:** [quilter.com/help-and-support/tools/promptcustomer/](https://www.quilter.com/help-and-support/tools/promptcustomer/)
 - **For advisers, visit:** [quilter.com/help-and-support/tools/new-prompt/](https://www.quilter.com/help-and-support/tools/new-prompt/)

*Before sending any supporting documents to us, please refer to our guide about which documents must be certified as true copies and who can certify them. The guide is available via your PROMPT link above.

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



1. Existing details

Title	Mr	Mrs	Miss	Ms	Other ▶ <i>Please specify</i>	
First name(s)	<input type="text"/>					
Surname/company/trust name	<input type="text"/>					
Date of birth	<input type="text"/>					
Existing residential/registered office address	<input type="text"/>				Postcode	
Customer Reference Number	A	C	<input type="text"/>	<input type="text"/>	<input type="text"/>	▶ <i>The instructions will be applied to all investments held under this Customer Reference Number.</i>

2. Your new details

Title	Mr	Mrs	Miss	Ms	Other ▶ <i>Please specify</i>	
First name(s)	<input type="text"/>					
Surname/company/trust name	<input type="text"/>					
Permanent residential/registered office address	<input type="text"/>				Postcode	
National Insurance number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	National Identity Number
Telephone number	<input type="text"/>				Email	<input type="text"/>
Correspondence address <i>(if different from above)</i>	<input type="text"/>				Postcode	

3. Declaration and authority

- a) I authorise and request Quilter to carry out the instructions detailed in this form, for all of my investments under the Customer Reference Number given in section 1.
- b) I understand that these changes will take effect in accordance with the account Terms and Conditions.
- c) I understand that Quilter may need to contact me for additional information if required.
- d) I declare that this form has been completed correctly to the best of my knowledge and belief.

If you are changing your name, please sign once with your former signature and once with your new signature, clarifying which is which.

If the account holder is a company or trust, this section must be signed by the authorised signatories.

Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity*	
Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity*	
Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity*	
Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity*	

* eg investor, trustee, signatory

▶ *Continue overleaf if there are more than four signatories.*



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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.

