

2. Lead Account Holder

Full name

Telephone number

Email

3. Online withdrawals (CIA only)

Tick here if you want to authorise the Lead Account Holder to request withdrawals, up to £75,000 to a verified bank account, from the CIA 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 Account Holder.

1. I, the account holder, appoint the person named in section 2 to act as the Lead Account Holder for the account detailed in section 1, in accordance with the 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 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**, I confirm the Lead Account Holder named in section 2 has the appropriate authority to act on behalf of the corporate entity.
5. I understand that:
 - a) this appointment is revocable and can be changed at any time as explained in the account Terms and Conditions.
 - b) by agreeing to the appointment, I authorise the Lead 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 Quilter can act on certain instructions received from the Lead Account Holder.
 - d) some instructions cannot be provided by the Lead Account Holder alone including, but not limited to, the following:
 - i. (CIB) instructions to withdraw money from or assign the account
 - ii. (CIA) instructions to transfer the account
 - iii. (CIA) instructions to withdraw money from the account, unless section 3 has been completed allowing online withdrawal requests subject to the maximum withdrawal amount noted above
 - iv. instructions to change details of a trust, eg the trustees
 - v. instructions to change the bank details for the account
 - vi. 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 Account Holder
 - the Lead 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 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 related Terms and Conditions
 - b) registering for the online Customer Centre will give me 'read only' access, unless I am the Lead Account Holder
 - c) the online Customer Centre Terms and Conditions override the standard Quilter product terms where the standard terms are incompatible with the ability to access the online Customer Centre facilities.
7. I authorise the Lead 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 Date

Print full name Capacity*

Signature Date

Print full name Capacity*

Signature Date

Print full name Capacity*

Signature Date

Print full name Capacity*

*eg account holder, lead 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.

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.

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