



Direct Debit amendment

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

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.

Did you know? Some instructions can be given by telephone or online.

See 'Giving us your instruction' below.

With this form you can:

- change the Direct Debit amount, frequency and collection date for an existing regular investment on an ISA, a JISA or a CIA.

This form cannot be used:

- to redirect (change) the assets into which future Direct Debits are invested - redirection instructions can be given online or on our Switch/Redirection Request form
- to change the bank account from which your Direct Debits are being paid - please use our Direct Debit Instruction form
- to change the regular initial fee for your financial adviser - your adviser can do this for you.

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

Completing this form

- Any third party paying the Direct Debit must complete section 7 Part B to authorise any changes.
- Tick/complete this form, as applicable, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- Missing or unclear information may result in delays. We are unable to correct errors or omissions by you or your financial adviser retrospectively.

Timescales

- Any changes in this form will take effect from your **next available Direct Debit collection date**.
- If we receive your instruction less than ten working days before your chosen collection date, we cannot guarantee that it will take effect from that date.

Giving us your instruction

- **By post** – to Quilter, SUNDERLAND, SR43 4JP.
- **Online/Telephone:** we can accept your request online or by telephone in the following circumstances:
 - the account is an ISA or a CIA in your sole name (not in joint names or in the name of a trust, company, club, charity or pension scheme), and
 - you, as the investor, pay the Direct Debits to be amended (ie they are not paid by a third party).

For **online instructions**, your financial adviser can go online for you or you can log in to our online Customer Centre:

To access our online Customer Centre visit our website [quilter.com](https://www.quilter.com)

- **If you have already registered:** click on the 'Customer login' button, then sign in to your account.
- **If you haven't yet registered:** click the 'Customer login' button, then click 'Register' and follow the instructions shown.

For **telephone instructions**, call us on 0808 171 2626.

1. Financial advice

Have you received advice from your financial adviser in respect of this instruction? Yes No

2. Your details

Full name of investor

▶ For a JISA, enter the child's name.

Permanent UK residential address

<input type="text"/>	
<input type="text"/>	Postcode

Telephone number

Email address

Full name of joint investor

▶ If applicable

Full name of registered contact

▶ JISA only

3. Your account details

Complete this section with the account number to which the Direct Debit changes relate:

ISA

JISA

CIA

4. Payer details

Please tick to indicate who pays the Direct Debit payment you wish to amend.

- 4.1 Investor ▶ Direct Debits are paid from the investor's own bank account
- 4.2 Registered contact ▶ JISA only
- 4.3 Other third party ▶ Please state the third party's name. The third party will need to sign section 7, Part B

5. Direct Debit amendments

5A Change the amount

New **TOTAL** Direct Debit amount

£

▶ Minimum monthly payment £99 (ISA/CIA), £50 (JISA);
minimum yearly payment £600 (ISA/CIA) £300 (JISA)

Note

- If you are decreasing the Direct Debit amount, any existing regular initial fees being paid to your financial adviser will continue at the current level, unless we are instructed otherwise.

5B Change the frequency

Frequency

Monthly

Yearly

5C Change the collection date

Next collection date

<input type="text"/>							
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▶ Any day from 01- 28 , but not more than 13 months in the future

6. Stop Direct Debits

Tick here to stop the Direct Debit collections

▶ To start collections again you will need to complete a new ISA, JISA or CIA application, as applicable.

7. Declaration and authority

Part A

This declaration is made by each account holder, authorised signatory or the JISA registered contact, as applicable.

- a) I authorise and request Quilter to carry out the instructions detailed in this form.
- b) I understand that these changes will take effect in accordance with the account Terms and Conditions.
- c) I confirm that I am authorised to give instructions for the account stated in section 3.
- d) I declare that this form has been completed correctly to the best of my knowledge and belief.

Where there is more than one account holder, or more than one person is required to authorise changes, each one must sign, even if a Lead Account Holder has been appointed.

Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity	<i>eg investor, trustee, signatory</i>
Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity	<i>eg investor, trustee, signatory</i>
Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity	<i>eg investor, trustee, signatory</i>
Signature	<input type="text"/>	Date	<input type="text"/>
Print full name		Capacity	<i>eg investor, trustee, signatory</i>

► Please continue below if there are more than four signatories

Part B

To be completed by the third party if 4.3 was completed in section 4.

I agree to the Direct Debit change(s) requested in this form.

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



[quilter.com](https://www.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.

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