

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 nominated bank account

– CashHub (CHB), powered by Bondsmith

With this form you can:

- change the nominated bank account for your CashHub savings.

This form cannot be used for:

- changing the bank account for withdrawals on any other Quilter product, for which there is a separate form, available from your financial adviser.

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



How to complete your form

- Use **BLOCK CAPITALS** and **blue** or **black** ink. For dates, please use the format day/month/year.
- 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

- We will need to see additional documents as proof of ownership of the new nominated bank account. More information is in section 2.



How to send us your form and document(s)

Email

Simply scan and email them securely to:

ask@quilter.com



Or

Post

Send to:

Quilter,
SUNDERLAND, SR43 4JP



1. Your details

| | | | | | | | | | | | | | | | | | | | |
|----------------------------------|--------------------|---|---------|--|--|--|--|--|--|--|--|--|-------|--|--|----------|--|--|--|
| CashHub account number | Customer Reference | | Account | | | | | | | | | | | | | | | | |
| | A | C | | | | | | | | | | | | | | | | | |
| Full name | | | | | | | | | | | | | | | | | | | |
| Date of birth | | | | | | | | | | | | | | | | | | | |
| Telephone number | | | | | | | | | | | | | Email | | | | | | |
| Permanent UK residential address | | | | | | | | | | | | | | | | Postcode | | | |

2. New nominated bank account details



This must be a UK bank account in your name or with you as a joint holder.

| | | | | | | | | | | | | | | | | | | | |
|----------------------------|------------|--|---|--|--|---|--|--|--------------------------------------|-------|--|--|--|--|--|--|--|--|--|
| Branch sort code | | | - | | | - | | | Bank/Building Society account number | | | | | | | | | | |
| Bank/Building Society name | | | | | | | | | | | | | | | | | | | |
| Name of account holder(s) | | | | | | | | | | | | | | | | | | | |
| Type of bank account | Individual | | | | | | | | | Joint | | | | | | | | | |

We will need to see proof that the bank account is yours. Please choose **one** of the following to send us with this form:

A voided cheque

A bank account statement dated within the last six months.

The proof must be an original or a certified copy. Copies must be certified on each page in ink by a UK-based professional such as a financial adviser, solicitor, accountant, GP or bank manager (including the bank's stamp). If you have online bank account statements we will accept a certified printed copy. You can scan and send certified documents to us by email to ask@quilter.com.

3. Your declaration and authority

1. I authorise Quilter and Bondsmith to change the nominated bank account for my CashHub to that detailed in section 2 of this form.
2. I understand that Quilter may need to contact me for additional information if required.
3. I declare that this form has been completed correctly to the best of my knowledge and belief.

Signature Date

Print full name Capacity*

*eg investor, attorney



[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.

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.

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