

#### 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.

## 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;** you or your financial adviser can confirm that this **December 2024** version is the latest by checking our website [quilter.com](https://www.quilter.com).



### How to complete your form

- You can complete the form electronically by using the editable fields, if preferred; save the form to your desktop before you do so, to ensure that the 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.
- 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](mailto:ask@quilter.com)



Or

#### Post

Send to:

Quilter,  
SUNDERLAND, SR43 4JP



## 1. Your details

CashHub account number	Customer Reference				Account				
	A	C							
Account holder's full name									
Telephone number					Email				
Permanent UK residential address								Postcode	
Joint account holder's full name (if applicable)									

## 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			Trust			Other						

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](mailto:ask@quilter.com).

## 3. Your declaration and authority

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

All account holders including trustees and/or signatories (as applicable) **MUST SIGN BELOW**, even if a Lead CashHub Account Holder has been appointed.

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

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 investor, attorney, trustee, signatory



[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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