

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



Completing this form (if you cannot give your instructions online)

- You can complete it electronically using the editable fields, if preferred. Save the form to your desktop before you do so, to ensure that your information is saved correctly, then print, sign and send it to us.
- Alternatively, print the form 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.
- References to Quilter in this form mean Quilter Life & Pensions Limited or Quilter Investment Platform Limited.
- **We will need to see evidence to support some types of change - details are on page 2.**



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're unable to give your instructions online:**

Send your scanned form* to us via PROMPT, our tool for uploading documents direct to us.

- Advisers, visit: [quilter.com/Adviser-Prompt](https://www.quilter.com/Adviser-Prompt)
- Customers, visit: [quilter.com/Customer-Prompt](https://www.quilter.com/Customer-Prompt)



OR

Send your scanned form* securely by email to:

ask@quilter.com



Alternatively, you can send your form by post to: Quilter, SUNDERLAND, SR43 4JP.

*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.





Additional documents we will need

Proof of new name

How your name has changed	Document(s) we will need
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:

- 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 forms of evidence, please call us on 0808 171 2626 or email ask@quilter.

Tax declaration

You must complete a Tax Declaration if there has been a change to the country(ies) in which you are deemed a national, citizen or tax resident.

- If your account(s) with us is in your name as an individual, you must complete and return the **Tax Declaration for Individuals**, attached at the end of this form.
- For accounts held in the name of an entity (eg a trust or company), you must complete and return our **Tax Declaration for Entities**, which is available from your financial adviser.

1. Your 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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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"/>

▶ *The instructions will be applied to all investments held under this Customer Reference Number.*

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"/>	National Identity Number
Telephone number	<input type="text"/>			Email	<input type="text"/>
Correspondence address <i>(if different from above)</i>	<input type="text"/>				Postcode

* *If you are now a national, citizen or tax resident in a country other than, or in addition to, the UK, you must also complete and send us a completed Tax Declaration; see above.*

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.
- e) Where there has been a change in the country of which I am a citizen/national or tax resident, I have included a Tax Declaration with this instruction. I understand that failure to provide a tax declaration may delay my instruction and cause the account to become reportable.

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

► If there are more than four signatories, please copy and complete this page with the additional details and attach it to your form.



[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.

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.





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.

Tax declaration for individuals

With this form:

- you can provide information about the nationality, citizenship or tax residency for one or more individuals associated with a new or existing account with Quilter.

We regularly update our forms; your financial adviser can confirm that this **September 2024** version is the latest by checking on our website [quilter.com](https://www.quilter.com)

When to use this form

- Where the nationality, citizenship or tax residency cannot be provided to us online
- Where there has been a change in name, address or tax residency of an individual associated with an existing account
- Where an existing account is assigned or transferred by the owner to another individual(s).



Completing this form:



You must complete the information for each individual named

- Failure to provide all relevant information may result in a delay to your instruction and/or cause the individual(s) to become reportable.
- The declarations made in this form will remain valid until there has been a change in circumstances. In this event, you must provide an updated declaration within 90 days of the event.

- We've provided notes and definitions at the back of this form to aid with completion.
- There is space in this form to provide information for two individuals. Please complete a separate form to provide the same information for any additional individuals.
- 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.



How to send us your form

Send your scanned form to us via PROMPT, our tool for uploading documents direct to us.

- Advisers, visit: [quilter.com/Adviser-Prompt](https://www.quilter.com/Adviser-Prompt)
- Customers, visit: [quilter.com/Customer-Prompt](https://www.quilter.com/Customer-Prompt)



OR

Send your scanned form securely by email to:

ask@quilter.com



Alternatively, you can send your form by post to: Quilter, SUNDERLAND, SR43 4JP.



1. Details of the individual(s)

Customer reference ▶ *If known*

A	C								
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Part A - First individual

Title	Mr	Mrs	Miss	Ms	Other ▶ <i>Please specify</i>		
First name(s)	<input type="text"/>						
Surname	<input type="text"/>						
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Country of birth	<input type="text"/>
Residential address	<input type="text"/>						
						Postcode	<input type="text"/>

Tick one of the following:

This individual is a British Citizen and UK tax resident only. **Go to part B**

This individual is a national, citizen or tax resident in a country other than, or in addition to, the UK

▶ *You must provide details in this section and list all countries in which they are a national, citizen or tax resident (include the UK, if it is applicable).*

Country	Status (tick all that apply)	Tax Identification Number(s) (TIN)	Type of TIN
	National/Citizen Tax resident		
	National/Citizen Tax resident		

If a TIN has not been provided, please explain why:

The country's tax authority has not issued a TIN to this individual.

Other - Please explain

Part B - Second individual ▶ *If applicable*

Title	Mr	Mrs	Miss	Ms	Other ▶ <i>Please specify</i>		
First name(s)	<input type="text"/>						
Surname	<input type="text"/>						
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Country of birth	<input type="text"/>
Residential address	<input type="text"/>						
						Postcode	<input type="text"/>

Tick one of the following:

This individual is a British Citizen and UK tax resident only. **Go to section 2**

This individual is a national, citizen or tax resident in a country other than, or in addition to, the UK

▶ *You must provide details in this section and list all countries in which they are a national, citizen or tax resident (include the UK, if it is applicable).*

Country	Status (tick all that apply)	Tax Identification Number(s) (TIN)	Type of TIN
	National/Citizen Tax resident		
	National/Citizen Tax resident		

If a TIN has not been provided, please explain why:

The country's tax authority has not issued a TIN to this individual.

Other - Please explain

2. Tax declaration and signature(s)



- This declaration is to be signed by each individual named in this form.
- Alternatively, the financial adviser, as agent, may make the declaration on their behalf.

1. I declare that the information provided in this Tax Declaration form is, to the best of my knowledge and belief, accurate and that the statements made herein are true and complete.
2. I declare that:
 - a) I am resident for taxation in the country(ies) shown in section 1 of this form and I am not resident for taxation elsewhere
 - b) I am a national or citizen of the country(ies) shown in section 1 of this form and I am not a national or a citizen of any other country
 - c) I will notify Quilter within 90 days if any information contained in this Tax Declaration form changes, and I understand that this will require a new form to be completed.
3. I understand that the information collected in this Tax Declaration form may be disclosed to HM Revenue & Customs which may, under a relevant inter-governmental agreement, provide the information to an overseas tax authority.
4. I understand that any missing or incomplete information may delay my instruction to Quilter and cause the individual(s) to become reportable.
5. **Personal information** – I confirm that:
 - a) I have read Quilter's privacy notice available at quilter.com/privacy concerning use of my personal information.
 - b) I have obtained the consent of any other party named in this form to use their personal data in accordance with Quilter's privacy notice.

By signing below I confirm that I have read the above declaration and, if a third party has completed this form on behalf of the entity that all the information provided within it is correct.

First individual's signature	<input type="text"/>	Date	<input type="text"/>
Joint individual's signature (if applicable)	<input type="text"/>	Date	<input type="text"/>
Financial adviser's signature*	<input type="text"/>	Date	<input type="text"/>

*Please also complete section 3

3. Financial adviser's details

This section is to be completed by the financial adviser, if they have signed in section 2.

Print name	<input type="text"/>	Position	<input type="text"/>
Email address	<input type="text"/>	Telephone	<input type="text"/>
Full name of regulated firm	<input type="text"/>	Financial Services number	<input type="text"/>



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Tax Declaration for individuals Notes and definitions

These notes are for you to keep; please read them before completing and submitting the form.

Why is a tax declaration needed?

- Under Automatic Exchange of Information (AEOI) regulations, Quilter is required to gather information about an individual's tax residency, nationality or citizenship.
- AEOI is a term that covers Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standards (CRS). These regulations are a commitment made by governments to exchange information about financial accounts held by taxpayers in another participating country.
- **National** and **Citizen** may have different meanings under local law. However, they usually refer to a person who has the right to live or work in a country.
- **Tax resident** refers to a person who is resident or deemed resident in a country for the purpose of reporting tax. Their status may be affected by the amount of time spent in a country or whether they're considered a national or citizen.



Completion of the tax declaration is compulsory

- If any information is missing or incomplete, your instruction to us will be delayed and cause the individual(s) to become reportable under AEOI regulations.

Tax Identification Number (TIN)

- A TIN is a number issued by the country's tax authority, usually automatically and on becoming resident in the country.
- Common examples of TIN types are given below:

Jurisdiction	Type of TIN
UK	National Insurance Number - Issued by HM Revenue & Customs
Jersey	Either: <ul style="list-style-type: none"> – Social Security Number – Tax Identification number Issued by Revenue Jersey
Guernsey	Either: <ul style="list-style-type: none"> – Social Security Number – Issued by the Guernsey Revenue Service – National Insurance Number – Issued by HM Revenue & Customs (UK)
Isle of Man	Either: <ul style="list-style-type: none"> – Tax Reference Number - Issued by the Income Tax Division – National Insurance Number – Issued by the Income Tax Division or HM Revenue & Customs (UK)



For guidance on TINs for other countries see:

www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers

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