

### 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.

## Adviser request to disable/re-enable client transactions via the oCC/app

- ISA, JISA, Collective Investment Account (CIA), Collective Investment Bond (CIB), Collective Retirement Account (CRA)
- CashHub (CHB), powered by Bondsmith

### With this form you can:

- request that certain transactions via the online Customer Centre (oCC) and the Quilter app are disabled/re-enabled for your clients.

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

### Completing this form

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

### Send your completed form as follows:

- **By email to:** [WFPAMAdviserServicing@quilter.com](mailto:WFPAMAdviserServicing@quilter.com)

### 1. Adviser details

Name of firm	<input type="text"/>	FCA number	<input type="text"/>
Contact name*	<input type="text"/>	* preferably the firm's Master User	
Email address	<input type="text"/>	Telephone	<input type="text"/>
Adviser Model or MPS Model user?	Yes	No	

### 2. Request

Please tick below to indicate whether oCC transactions should be enabled for clients of the adviser firm named in section 1.

▶ The pre-filled ticks indicate transactions that are already disabled for all oCC users.

ISA/JISA	Enable	Disable
Payments in (new)	-	<input checked="" type="checkbox"/>
Payments in (top-ups)	<input type="checkbox"/>	<input type="checkbox"/>
Payments out	<input type="checkbox"/>	<input type="checkbox"/>
Trades (switches)	<input type="checkbox"/>	<input type="checkbox"/>

CIA	Enable	Disable
Payments in (new)	-	<input checked="" type="checkbox"/>
Payments in (top-ups)	<input type="checkbox"/>	<input type="checkbox"/>
Payments out	<input type="checkbox"/>	<input type="checkbox"/>
Trades (switches)	<input type="checkbox"/>	<input type="checkbox"/>

CHB	Enable	Disable
Payments in (apply, new)	<input type="checkbox"/>	<input type="checkbox"/>
Payments in (top-ups)	<input type="checkbox"/>	<input type="checkbox"/>
Payments out (withdrawals)	<input type="checkbox"/>	<input type="checkbox"/>
Trades (move savings)	<input type="checkbox"/>	<input type="checkbox"/>

CRA	Enable	Disable
Payments in (new)	-	<input checked="" type="checkbox"/>
Payments in (top-ups)	<input type="checkbox"/>	<input type="checkbox"/>
Payments out	-	<input checked="" type="checkbox"/>
Trades (switches)	<input type="checkbox"/>	<input type="checkbox"/>

CIB	Enable	Disable
Payments in	-	<input checked="" type="checkbox"/>
Payments out	-	<input checked="" type="checkbox"/>
Trades (switches)	<input type="checkbox"/>	<input type="checkbox"/>



If disabling transactions on page 1, please state the reason

### 3. Authorisation

- a) Please disable/re-enable transactions as indicated in section 2, for clients of the adviser firm named in section 1.
- b) If the request is to disable transactions, I confirm that my clients are aware of this.
- c) I understand that Quilter will reinstate access for any disabled transactions, if contacted direct by a client with such a request, and that Quilter will inform both the adviser firm and the client when the update has been completed.

Signature

Date

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Print full name

Position within the firm



### quilter.com

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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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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.

