Quilter

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*

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*

1. Adviser details

Name of firm		FCA number	
Contact name*			* preferably the firm's Master User
Email address		Telephone	

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)*	-	✓
Payments in *(top-ups)*		
Payments out		
Trades *(switches)*		

CIA	Enable	Disable
Payments in *(new)*	-	✓
Payments in *(top-ups)*		
Payments out		
Trades *(switches)*		

CHB	Enable	Disable
Payments in *(apply, new)*		
Payments in *(top-ups)*		
Payments out *(withdrawals)*		
Trades *(move savings)*		

CRA	Enable	Disable
Payments in *(new)*	-	✓
Payments in *(top-ups)*		
Payments out	-	✓
Trades *(switches)*		

CIB	Enable	Disable
Payments in	-	✓
Payments out	-	✓
Trades *(switches)*		

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

Print full name

Position within the firm

quilter.com