



Direct Debit amendment

– *Collective Retirement Account (CRA)*

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.

Did you know? You might not need to send us a form.

Some instructions can be given by telephone or online. See 'Giving us your instruction' below.

With this form you can:

- change the Direct Debit amount, frequency and collection date for an existing regular investment on a Collective Retirement Account (CRA).

This form cannot be used:

- to redirect (change) the assets into which future Direct Debits are invested - please use our Switch/Redirection Request form
- to amend employer regular payments - please use the Employer Payer form
- to change the bank account from which your Direct Debits are being paid - please use the Direct Debit Instruction form
- to change the regular initial fee for your financial adviser – please speak to your financial adviser.

We regularly update our forms; your financial adviser can confirm that this **August 2023** version is the latest by checking on our website quilter.com

Completing this form

- Any other third party paying the Direct Debit must complete section 6 Part B to authorise any changes.
- Complete this form using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- Missing or unclear information may result in delays. We are unable to correct errors or omissions by you or your financial adviser retrospectively.
- **This instruction could change the Charge Basis for your account** – see the Guidance Notes at the end of the form for more information.

Timescales

- If we receive your instruction less than ten working days before your chosen collection date, we cannot guarantee that it will take effect from that date.

Giving us your instruction

- **By post** – to Quilter, SUNDERLAND, SR43 4JP.
- **Online/Telephone:** we can accept your request online or by telephone if you, as the investor, pay the Direct Debits to be amended (i.e. they are not paid by a third party).
For **online instructions**, your financial adviser can go online for you or you can log in to our online Customer Centre:
 - **If you have already registered:** click on the 'Customer login' button, then sign in to your account.
 - **If you haven't yet registered:** click the 'Customer login' button, then click 'Register' and follow the instructions shown.
 For **telephone instructions**, call us on 0808 171 2626.

1. Financial advice

Have you been given financial advice in respect of this instruction?

Yes

No

2. Investor details

Full name

Telephone

Email

CRA account number

3. Change regular payment – paid by the investor

Regular payment – Net ▶ Minimum £40 net (£50 gross) if monthly, £2,880 net (£3,600 gross) if yearly

Frequency Monthly Yearly

First collection date ▶ Any day from 1-28, but no more than 13 months in the future

Annual escalation* No escalation (0%) Average weekly earnings

* This is where Direct Debits can be increased automatically each year in line with Average Weekly Earnings. If left blank we will assume no escalation is required.

4. Change regular payment – paid by the employer

Please use the Employer Payer form.

5. Change regular payment – paid by a third party

Regular payment – Net ▶ Minimum £40 net (£50 gross) if monthly, £2,880 net (£3,600 gross) if yearly

Frequency Monthly Yearly

First collection date ▶ Any day from 1-28, but no more than 13 months in the future

Annual escalation* No escalation (0%) Average weekly earnings

* This is where Direct Debits can be increased automatically each year in line with Average Weekly Earnings. If left blank we will assume no escalation is required.

6. Declaration and authority

Part A

This declaration is made by the CRA account holder.

- a) I authorise and request Quilter to carry out the instructions detailed in this form.
- b) I understand that these changes will take effect in accordance with the CRA Terms and Conditions.
- c) I confirm that I am authorised to give instructions on the account stated in section 2.
- d) I declare that this form has been completed correctly to the best of my knowledge and belief.
- e) I understand that if this instruction converts my account to Charge Basis 2, all commission payments to my financial adviser will stop and the account cannot revert to Charge Basis 1.

Signature Date

Part B

To be completed by the third party if section 5 was completed.

Not applicable for employer Direct Debits

I agree to the Direct Debit change(s) requested in this form.

Third party's signature Date

Print full name

Company name Capacity in which signing

▶ If applicable



Guidance notes

This instruction could change the Charge Basis for your account.

Our three different charge bases are:

Charge Basis 1

This applies to CRAs that are subject to the Investor Charge and on which financial advisers are entitled to receive commission.

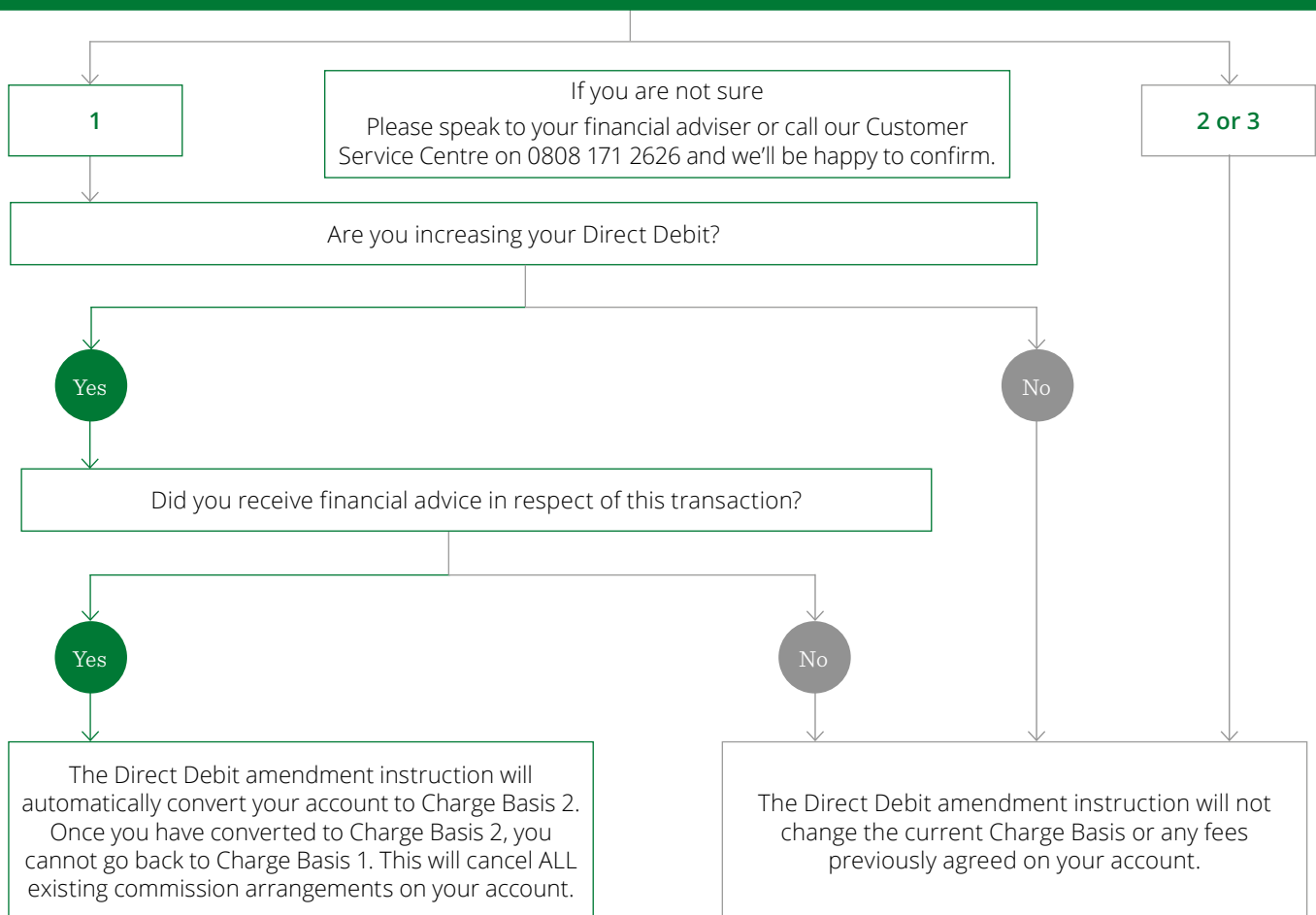
Charge Basis 2

This applies to CRAs that are subject to the Investor Charge and Adviser Charging, where financial advisers are paid by fees rather than commission.

Charge Basis 3

This applies to CRAs that are subject to the Product Charge and Adviser Charging, where financial advisers are paid by fees rather than commission.

What is your Charge Basis?



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).

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