

### 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.

## Data Subject Access Request

### *With this form:*

- you, or someone you have authorised to represent you, can request a copy of the personal information we hold about you.

- Note** – To protect the privacy of your information, we may need to contact you to validate your identity before we make any information available.
- If you are not the person whose data is being requested (the 'data subject') and you are completing this form as their representative:
    - please provide the data subject's name, address and date of birth, together with your own details on the next pages
    - the data subject will need to sign this form in section 5 to authorise you to act as their representative.

### *What is a Data Subject Access Request?*

You have the right to get a copy of information that is held about you. This is known as a 'data subject access request' or 'DSAR' and for the purposes of this you are referred to as the 'data subject'.

The privacy notice for Quilter Investment Platform Limited ('Quilter'), provides information concerning the collection and use of your data together with information about your rights as a data subject, this is available at [quilter.com/privacy](https://quilter.com/privacy).

### *Making a data subject access request*

- To make your Data Subject Access Request, please complete this form.
- Use BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- Providing specific information about the data you require will help us process your request faster.

### *Send your completed form as follows:*

- **By email:** send your scanned, completed form to [QIPDataGuardian@quilter.com](mailto:QIPDataGuardian@quilter.com)
  - **Important:** The form contains your personal identifiable data. In order to protect your data, it should only be sent to us via secure or encrypted email.
- **By post:** to The Data Guardian, Quilter, SUNDERLAND, SR43 4JP.

## 1. Contact method

Please indicate how you would like us to contact you:    By courier post                      By secure email\*

\* If you wish us to use email to correspond and issue data please note that this will be sent using the Quilter Privacy Portal.  
Please complete the email address details in section 2 or 3 as applicable.



## 2. Data subject's details

If a joint account is held please ensure both account holders complete this section.

### 2.1 First account holder/data subject

Full name	<input type="text"/>		
Previous name	<input type="text"/>		
	▶ <i>If it has changed since you last contacted us</i>		
Date of birth*	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone number	<input type="text"/>	Email	<input type="text"/>
National Insurance number*	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

If your address has changed since you last contacted us, please provide your previous address below.

Previous address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

### 2.2 Second account holder/data subject (where applicable)

Full name	<input type="text"/>		
Previous name	<input type="text"/>		
	▶ <i>If it has changed since you last contacted us</i>		
Date of birth*	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone number	<input type="text"/>	Email	<input type="text"/>
National Insurance number*	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

If your address has changed since you last contacted us, please provide your previous address below.

Previous address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

\* This information will be used to identify and verify you as the data subject

## 3. Representative contact's details (if applicable)

If you are acting as the representative of the data subject, please provide your details in this section.

Full name	<input type="text"/>		
Company name	▶ <i>If applicable</i> <input type="text"/>		
Telephone number	<input type="text"/>	Email	<input type="text"/>
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
	▶ <i>If different from the data subject's address</i>		

The data subject(s) will need to sign this form in section 5 to authorise you to act as their representative. If submitting this request by email we will need to contact you separately for their signed authority.



## 4. The data subject's data

Quilter will provide you with a copy of all data held for the data subject(s).

However, if you want to receive specific information, please use the box below to indicate what you require, providing as much relevant information as possible. ► *For instance account numbers, dates, times, telephone numbers (as applicable).*

## 5. Your request and authorisation

This section must be completed by the data subject(s) in all cases, and their authorised representative (if applicable).

### 5.1 For completion by each Data Subject:

- a) I request and authorise Quilter to complete a Data Subject Access Request and provide the information specified in section 4.
- b) (if section 3 has been completed) I authorise the person named in section 3 to act as my representative for this Data Subject Access Request and to receive the information specified in section 4.

### Signatures ► *Each data subject must sign*

Data subject 1

Date

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Data subject 2  
*(if applicable)*

Date

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### 5.2 For completion by the representative contact (if applicable)

- a) I, as the representative contact named in section 3, request and authorise Quilter to complete a Data Subject Access Request and provide the information specified in section 4.
- b) I understand that if this request is not being submitted by post, I will need to provide each data subject's signed authority for me to make this request on their behalf.

Signed

*as the representative contact*

Date

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*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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