



Direct Debit Instruction

Collective Retirement Account (CRA)

With this form you can:

- start a new Direct Debit for individual or third-party regular investments as part of a CRA application
- change bank details on an existing Direct Debit.

This form cannot be used:

- for any other Direct Debit changes, please use our **Direct Debit Amendment** form for the CRA
- for employer investments, please use the **Employer Payer Form**.

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

- Complete this form using BLOCK CAPITALS and blue or black ink. For dates, use the format day/month/year.
- The collection date can be any day from 1-28; the first collection date cannot be more than 13 months in the future.
- If we receive your instruction less than 10 working days before the collection date requested, we cannot guarantee that it will take effect for that month. If you leave the collection date blank, we will use the next available collection date.
- We will complete the 'reference' shown on the Direct Debit Instruction; please leave this blank.
- The instruction must be dated, and signed in accordance with the authorised signature(s) for the bank account.

Full name of the CRA account holder

CRA account number

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Tick to indicate the payer of the Direct Debit

Investor

Third Party

First collection date

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Frequency

Monthly

Annually

Privacy information – a privacy notice is available on our website at quilter.com/privacy concerning use of personal data.

Instruction to your bank or building society to pay by Direct Debit.



Please complete the form and send to:

Quilter Life & Pensions Limited,
SUNDERLAND, SR43 4JP.

Name and full postal address of your bank or building society

To: The Manager	
	bank/building society
Address	

Service user number

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Reference

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Instruction to your bank or building society

Please pay Quilter Life & Pensions Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Quilter Life & Pensions Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date

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Bank/building society account number

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Branch sort code

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Banks and building societies may not accept Direct Debit Instructions for some types of account.

This Guarantee should be detached and retained by the payer.

The Direct Debit Guarantee.

- This Guarantee is offered by all banks and building societies that accept Instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Quilter Life & Pensions Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request Quilter Life & Pensions Limited to collect a payment, confirmation of the amount and the date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Quilter Life & Pensions Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
 - If you receive a refund you are not entitled to, you must pay it back when Quilter Life & Pensions Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.





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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).

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.

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