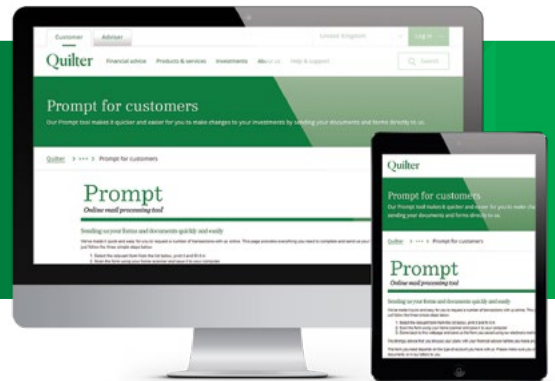


## How to send us instructions and supporting documents

*ISA, Junior ISA (JISA), Collective Investment Account (CIA), Collective Investment Bond (CIB) and Collective Retirement Account (CRA)*

### *Guide for account holders only*

*This guide will help you to identify the quickest way to send us instructions or supporting documents for your account.*



### *Send us instructions online*

*If you are registered for our online Customer Centre, you can:*

- ▶ Switch your funds
- ▶ Change the funds for your Direct Debit collections
- ▶ Update your personal details.

#### **Collective Investment Account (CIA), ISA and Junior ISA only**

- ▶ Change your Direct Debit amount, frequency or collection date
- ▶ Make a one-off lump sum payment into your account
- ▶ Make a withdrawal up to £50,000 (from an account in your sole name).

*Your financial adviser can do all of the above online for you, plus...*

- ▶ Add, amend or cancel fees agreed between you and your adviser
- ▶ Change the Direct Debit amount, frequency or collection date on your Collective Retirement Account
- ▶ Make a one-off lump sum payment into your Collective Investment Bond or Collective Retirement Account.

### *Send us instructions using PROMPT or email*

PROMPT is our tool that allows you to scan and send us paper-based instructions direct. The tool will generate an email template, which will route the instruction precisely where it needs to go.

You can access the tool here [quilter.com/help-and-support/tools/promptcustomer/](https://quilter.com/help-and-support/tools/promptcustomer/) or by visiting Quilter.com and searching for 'PROMPT'.

Alternatively, you can email your instruction to [ask@quilter.com](mailto:ask@quilter.com).



Any attachment you send must be a true and complete copy of either:

- the original document, or
- a certified copy of the original document

which has not been tampered with.

## Which instructions can be sent using PROMPT or email?

We have several Quilter forms that you can use to provide us with your instructions, available from [www.quilter.com/documents](http://www.quilter.com/documents).

Please check the instructions page for the form, which will tell you if it can be sent to us using PROMPT or email.

### Examples of instructions you can provide in this way:

- Withdrawal/Account Closure request
- Change of personal details
- Family linking request
- 'Expression of wish' instructions.

## Supporting documents

From time to time, we'll ask you to send documents to support your instructions. Below is a list of the most common documents, with details of how you can send them to us and our requirements when sending us a certified copy.



Financial advisers can electronically submit supporting documents to us on your behalf, and confirm that they've seen them, without needing to certify them as true copies.

<b>Marriage Certificate</b>	<b>You can send a scanned copy using PROMPT/email</b> if it has been certified as a true copy of the original document by one of the following:
<b>Deed Poll</b>	<ul style="list-style-type: none"><li>- Your financial adviser</li><li>- Solicitor</li></ul>
<b>Civil Partnership Certificate</b>	<ul style="list-style-type: none"><li>- Your GP</li><li>- Bank Manager</li></ul>
<b>Birth Certificate / Adoptive Birth Certificate</b>	<ul style="list-style-type: none"><li>- Accountant</li><li>- A person authorised to undertake notary duties.</li></ul>
<b>Death Certificate</b>	Alternatively, if PROMPT or email is not an option, you can send us either the original document, or an official copy issued by the Registrar or General Register Office, <b>by post</b> .
<b>Passport or photo driving licence</b>	<b>You can send a scanned copy using PROMPT/email</b> if it has been certified as a true copy of the original document by one of the following: <ul style="list-style-type: none"><li>- Your financial adviser</li><li>- Solicitor</li><li>- Your GP</li><li>- Bank or building society official</li><li>- Accountant.</li></ul> Alternatively, if PROMPT or email is not an option, you can send us the certified copy <b>by post</b> .
<b>Power of Attorney document</b>	<b>You can only send this document by post</b> , either the original document or a certified copy. Under regulations governing Powers of Attorney, a copy must be certified in ink on each page and <b>only</b> by one of the following: <ul style="list-style-type: none"><li>- The donor (<i>the person who is the subject of the Power of Attorney; they may create and certify copies while they still have capacity to do so</i>)</li><li>- A solicitor</li><li>- A person authorised to carry out notary activities</li><li>- A stockbroker.</li></ul> The strict legislation does not permit financial advisers to create and certify copies.

<i>Court of Protection order</i>	<b>You must send by post</b> the original court order or an official copy (referred to as an 'office copy'), which is a duplicate of the original document containing the seal of the Court of Protection.
<i>Grant of Probate</i>	<b>You must send by post</b> the original or a sealed copy, which is a duplicate of the original document issued by the probate registry.
<i>'Quilter' trust deeds*</i> *These are draft trust deeds provided by Quilter, which you can use to place your Collective Investment Bond in trust.	Where you have requested Quilter to date the deed, bringing the trust into force, <b>you must send us the original.</b> Where you have dated the deed yourself, you may send us a <b>scanned copy using PROMPT or email.</b> The copy must be certified by one of the following: - A solicitor - Your financial adviser.
<i>Other trust deeds, deed of assignment, deed of appointment, deed to change trustees</i>	<b>Send a scanned copy using PROMPT or email.</b> The copy must be certified as a true copy on each page by one of the following: - A solicitor - Your financial adviser. Alternatively, if PROMPT or email is not an option, you can send us either the original document or certified copy <b>by post.</b>
<i>Pension Sharing Order and related documents*</i> *Including the decree absolute/final order, pension sharing order/consent order/Minutes of Agreement.	<b>Send a scanned copy using PROMPT or email.</b> No certification is required. Alternatively, if PROMPT or email is not an option, you can send us the document <b>by post.</b>

## Send us documents by post

If PROMPT or email is not an option, you can post instructions and supporting documents to us at:

Quilter, SUNDERLAND, SR43 4JP.

### Scanned copies

If we receive a document from you, which we are unable to accept as a scanned copy we will contact you directly.

### Our contact details

Customer Service Centre - Freephone 0808 171 2626

Email - [ask@quilter.com](mailto:ask@quilter.com)

### 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).

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.