



Client reference number

For office use only



CHANGE OF NAME AND/OR ADDRESS

FORM PURPOSE

You can use this form to change your name and/or address for your ISA, Collective Investment Account, Collective Investment Bond or Collective Retirement Account.

Important notes

- Please use **BLOCK CAPITALS** only and blue or black ink.
- This form must be signed and sent to the following address:
Old Mutual Wealth, Old Mutual House, Portland Terrace, Southampton SO14 7AY

Section 1 – Complete this section with your existing details.

Section 2 – Complete this section with your new details.

1 EXISTING DETAILS

Please state your client reference number

Title (*tick*)

Mr

Mrs

Miss

Other (*please specify*)

Surname/company/
trustee name

Full forename(s)

Date of birth

Existing telephone number

Existing residential/
registered office
address

Postcode

Existing correspondence
address
(*if applicable*)

Postcode

2 NEW DETAILS

Please give your new details in this section, as applicable

New name
(please attach original legal document(s) supporting the change of name)

Title *(tick)*

Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Other <i>(please specify)</i>	<input type="text"/>
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Surname/company/
trust name

Full forename(s)

New permanent
residential/registered
office address

Postcode

NOTE: If your new address is not in the UK, you must inform us if you are no longer a UK tax payer.

Telephone number

E-mail address

New correspondence
address
*(if different from the
residential/registered office
address)*

Postcode

If your address has changed within the last 12 months, we will need proof of the new address, for instance a recent original bill showing the new address, eg phone, electricity, gas, water, etc but not a mobile phone bill.

3 DECLARATION AND AUTHORITY

- I authorise and request Old Mutual Wealth to carry out the instructions detailed in this form.
- I understand that these changes will take effect in accordance with the account/bond Terms and Conditions.
- Old Mutual Wealth may need to contact me for additional information if required.
- I declare that this form has been completed correctly to the best of my knowledge and belief.

If the account/bond holder is a company or trust, this section must be signed by the authorised signatories.

Signature

Date

Signature

Date

Signature

Date

Signature

Date

www.oldmutualwealth.co.uk

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Old Mutual Wealth is the trading name of Old Mutual Wealth Limited which provides an Individual Savings Account (ISA) and Collective Investment Account (CIA) and Old Mutual Wealth Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Old Mutual Wealth Limited and Old Mutual Wealth Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively. Registered Office at Old Mutual House, Portland Terrace, Southampton SO14 7EJ, United Kingdom. Old Mutual Wealth Limited is authorised and regulated by the Financial Conduct Authority. Old Mutual Wealth 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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