



DIRECT DEBIT INSTRUCTION –

For use with the ISA and Collective Investment Account

IMPORTANT NOTES:

- You can use this form to
 - change the bank details for an existing Direct Debit on an ISA or a Collective Investment Account (CIA) with Old Mutual Wealth Limited. If you wish to start paying by Direct Debit, you must complete an application form
 - support an online application for an ISA/CIA where a paper Direct Debit instruction is required
 - restart a Direct Debit on your ISA or CIA.
- If you need to change any other details of an existing Direct Debit arrangement, please complete a **Direct debit amendment for the ISA or Collective Investment Account** form.
- Direct Debit collections will show on your bank statement as Old Mutual Wealth Limited.
- This Direct Debit instruction should be completed in BLOCK CAPITALS with blue or black ink.
- We will insert the 'Reference' on the Direct Debit instruction, please leave this blank.
- The completed form should then be sent to us at the address below. Do not send this form to your bank.

Investor name(s) ► include joint holder names or name of company/trust/scheme, if applicable

Please quote your existing client reference number ► if known

Application number ► if applicable

Please tick the date you would like your monthly Direct Debit investments to be collected from your bank.

10th

20th

If you tick neither date, we will collect your Direct Debits on the 10th of each month.

Monthly direct debit investments will CONTINUE INDEFINITELY unless we hear otherwise from you.



INSTRUCTION TO YOUR BANK OR BUILDING SOCIETY TO PAY BY DIRECT DEBIT.



Please complete the form and send to:

Old Mutual Wealth Limited, Old Mutual House, Portland Terrace,
Southampton SO14 7AY.

Name and full postal address of bank/building society

To: The Manager	
bank/building society	
Address	
Postcode	

Service user number

6	9	0	6	9	7
---	---	---	---	---	---

Reference

--	--	--	--	--	--	--	--	--	--	--

Instruction to your bank or building society

Please pay Old Mutual Wealth 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 Old Mutual Wealth Limited and, if so, details will be passed electronically to my bank/building society.

Name(s) of account holder(s)

Signature(s)

Date

/	/	/20
/	/	/20

Bank/building society account number

--	--	--	--	--	--	--	--

Branch sort code

			-				
--	--	--	---	--	--	--	--

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 Old Mutual Wealth Limited will notify you five working days in advance of your account being debited or as otherwise agreed. If you request Old Mutual Wealth Limited to collect a payment, confirmation of the amount and 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 Old Mutual Wealth 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 Old Mutual Wealth 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.

Old Mutual Wealth
Head Office
Old Mutual House
Portland Terrace
Southampton
SO14 7AY

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.

When printed by Old Mutual this item is produced on a mixed grade material, which uses a combination of recycled wood or paper fibre from controlled sources and virgin fibre sourced from well managed, sustainable forests.

PDF5425/216-0909/August 2016

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.

When printed by Old Mutual this item is produced on a mixed grade material, which uses a combination of recycled wood or paper fibre from controlled sources and virgin fibre sourced from well managed, sustainable forests.

PDF5425/216-0909/August 2016