



# DIRECT DEBIT INSTRUCTION

– For use with the ISA or Collective Investment Account (CIA)

**WITH THIS FORM YOU CAN:**

- start a new Direct Debit for individual or third-party regular investments. You will also need an online application or a paper **ISA Application or Application for a Collective Investment Account (CIA)**, completing the third-party payer details if appropriate
- restart a Direct Debit for individual or third-party regular investments
- change bank details on an existing Direct Debit. For all other changes, please use the **Direct Debit Amendment for the ISA or Collective Investment Account**.

This form cannot be used:

- for the Collective Retirement Account.

**NOTE**

- Please use BLOCK CAPITALS only and blue or black ink.
- We will apply the reference number in relation to the Direct Debit Instruction; please leave this blank.
- Please ensure all applicable sections of the form are completed clearly, as missing or unclear information will result in a delay in processing or the return of this form.
- Direct Debit collections will show on your bank statement as Old Mutual Wealth.

Full name of the ISA or Collective Investment Account investor

Client reference number (if known)

Application number (if applicable)

Please tick to indicate which contribution this instruction relates to

Investor  Third party

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.

**The instruction below must be dated, and signed in accordance with the authorised signature(s) for the bank account.**


**OLD MUTUAL**  
 WEALTH

## 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.

Service user number

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Name and full postal address of bank/building society

To: The Manager
bank/building society
Address
Postcode

Reference

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**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.

Signature(s)

Date

 /  /20

 /  /20

Name(s) of account holder(s)

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 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](http://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.

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