POWER OF ATTORNEY FORM

Individual Savings Account (ISA), Collective Investment Account (CIA),
Collective Retirement Account (CRA) and Collective Investment Bond (CIB)

USE THIS FORM TO:

– provide verification of the identity of an attorney

– confirm the nature of the donor's incapacity (CRA and ISA)

NOTE

- Please attach with this form the original registered Power of Attorney, or a copy certified as a true copy of the original in ink on each page by a solicitor or the donor (ie the person giving the power).
- We can only accept an Enduring Power of Attorney, a Property & Affairs Lasting Power of Attorney, a General Power of Attorney (CIB and CIA only) or a Scottish Continuing Power of Attorney.
- **Send the completed form and Power of Attorney document to:**
  Old Mutual Wealth, Old Mutual House, Portland Terrace, Southampton SO14 7AY.

Please tick/complete this form, as applicable, using BLOCK CAPITALS and blue or black ink.

1. INVESTOR DETAILS

The investor's client reference number ▶ *if known*

Application number ▶ *if applicable*

Title ◯ Mr ◯ Mrs ◯ Miss ◯ Other ▶ *please specify*

Surname

Full forename(s)

Permanent residential address

Postcode

Date of birth *(dd/mm/yyyy)*

2. ACCOUNT/BOND DETAILS

Complete this section with details of the accounts/bonds, on which the Power of Attorney is to be noted.

Account/Bond number* ◯ ISA ◯ CIA ◯ CRA ◯ CIB

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** If this instruction relates to a new account/bond please provide the online application number instead.*

3. ATTORNEY DETAILS

Where there is more than one attorney, please attach the same information for each one by using a copy of this page.
We will need:

- the attorney's details below
- the original Power of Attorney, or a copy certified as a true copy of the original in ink on each page by a solicitor or the donor (ie the person giving the power)
- the attorney's identity verified.

Full name/
Company name

Full postal address

Postcode

Is correspondence for accounts/bonds listed in section 2 to be sent to this address in future? ◯ Yes ◯ No

Date of birth *(dd/mm/yyyy)*

Company registration number

If an ISA or CRA is listed in section 2:

Under HMRC regulations, we can only accept an ISA or CRA application made under a Power of Attorney if we have confirmation that at least one of the following circumstances applies. Please tick to indicate why the investor is unable to act him/herself:

◯ Physical disability, illness or old age

◯ Mental disorder or incapacity

◯ The investor is a member of the armed forces on active service in a war zone (acceptable for ISAs only).

I can confirm that I have been shown and have read the privacy notice.

Attorney's signature (if you sign any instructions on the investor's behalf, please add 'as attorney' after your signature)

Date *(dd/mm/yyyy)* 2 0

4. FINANCIAL ADVISER'S DECLARATION ▶ *to be completed by your financial adviser*

I confirm that:

(a) I have verified the identity of all relevant parties referred to in this form
(b) the information in this form was obtained by me in respect of the relevant parties
(c) the evidence I have obtained to verify the identity of the relevant parties can be produced on demand and meets the standard of evidence set out within the guidance for the UK Financial Sector issued by the Joint Money Laundering Steering Group (JMLSG)
(d) if any individual referred to in this form has changed address within the last three months, I can provide evidence on demand
(e) I have not verified the identity of the following parties referred to in this form because they are exempt from verification under Money Laundering Regulations

(f) this section is signed below by the person who has seen the documentary evidence (which may include an electronic identity check).

Financial adviser's signature

Date *(dd/mm/yyyy)* 2 0

Print name

Position

Financial Services number

Contact number

Full name of regulated firm *(or sole trader)*

www.oldmutualwealth.co.uk

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.

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).