

## Change of bank details form

This form should be used to notify Curtis Banks Ltd of a change to your nominated bank details. The form must be completed in full before any change will take effect.

### 1 Accessing our services

---

If you experience difficulties accessing any of our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

**The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.**

We will require your express consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs. Please could you kindly provide this below.

**I agree to my information being processed by Curtis Banks Group, to include being shared and gathered between relevant third parties.**

Please refer to our Privacy Information Notice for Clients, should you require further guidance on how we collect use and protect your personal information. This can be found on our website [www.curtisbanks.co.uk](http://www.curtisbanks.co.uk) or please ask your adviser or us for a copy.

Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent, please contact the Client Management Team on 0117 332 4080 or [cmt@curtisbanks.co.uk](mailto:cmt@curtisbanks.co.uk).

### 2 Your details

---

|                |                      |
|----------------|----------------------|
| Name           | <input type="text"/> |
| Name of scheme | <input type="text"/> |
| Plan number    | <input type="text"/> |

### 3 Bank account details

---

Please enter your new bank account details below.

|                           |                                  |
|---------------------------|----------------------------------|
| Bank or building society  | <input type="text"/>             |
| Address                   | <input type="text"/>             |
|                           | Postcode <input type="text"/>    |
| Sort code                 | <input type="text"/>             |
| Account in the name(s) of | <input type="text"/>             |
| Account number            | <input type="text"/>             |
| Payment reference         | <input type="text"/>             |
|                           | Roll number <input type="text"/> |

#### Notes

As part of processing this request we will require a copy bank statement showing the new bank details, this must be dated within the last 3 months for a postal statement or 1 week for an online statement.

There may be additional details we need to confirm with you in relation to the new details before any changes can take effect, we will contact you or your nominated adviser in this regard.

- You can change your bank details at any time by completing a further Change of Bank Details form.
- Curtis Banks Ltd can only make pension payments to an account held solely or jointly in the name of the member.
- Any payments made to overseas bank accounts may incur additional bank charges.

## 4 Declaration

- I nominate my bank details to be amended to those shown above. I understand that all future benefit payments will be paid into this account and I will notify Curtis Banks Ltd immediately if my details change or this account is closed.

Print name

Signature of client

Date

 /  / 

Curtis Banks Limited,  
3 Temple Quay,  
Bristol, BS1 6DZ

T 0117 910 7910  
F 0117 929 2514  
[curtisbanks.co.uk](http://curtisbanks.co.uk)

**Call charges will vary. We may record and monitor calls.**

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication.

Curtis Banks Limited is a company registered in England & Wales (registered number 06758825) and is authorised and regulated by the Financial Conduct Authority (number 492502) with its registered address at 3 Temple Quay, Bristol BS1 6DZ. BANK CHANGE 0623 June 2023

