

## Change of Details

Please use this form if you wish to update your details held with Curtis Banks. If you wish to update your address, please use the 'Change of address form' available on our website.

### 1 Accessing our services

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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).

### 1 Your details

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Name

Plan number

### 2 Details you wish to change

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Please tick which details you wish to update:

|                 |                  |                        |
|-----------------|------------------|------------------------|
| Mobile number   | Date of birth    | Retirement details     |
| Landline number | Surname          | Work phone number      |
| Email address   | Name             | Gender                 |
| Title           | Employer details | Other (please specify) |

### 3 Your previous/current and updated details

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Please provide your previous/current and updated details:

(if appropriate, please also provide the date the changes take effect)

Previous/Current

New

If you have selected surname, name or title, we will also require sight of the following:

- Certified copy of marriage certificate/Deed Poll.
- Certified photographic ID with your new signature and name.

If you have selected gender, we will also require sight of the following:

- Signed letter from the client confirming the change of gender.
- Certified copy of letter from NHS or Gender Recognition Certificate (if transition happened more than 2 years ago).
- Certified copy of change of name deed.
- Certified copy of ID with new name and signature on.

**Please note: without these documents we will be unable to update your details**

## 4 Declaration

Please update the details as provided above:

**Name**

**Signed**

**Date**

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

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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.

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