

Nominated Bank Account Instruction

This form can be used to advise Cofunds of your nominated bank account details. Please complete this form for each account at Cofunds which this applies to. Please allow up to 10 business days from the time Cofunds receives the instruction for your nominated bank account details to change.

Please complete this application form using black ink in BLOCK CAPITALS and return to: Cofunds Limited, PO Box 1103, Chelmsford CM99 2XY

1 Adviser/Intermediary Details (For adviser/intermediary use only)

Cofunds Intermediary Authorisation Code

CONFIRMATION OF VERIFICATION OF BANK ACCOUNT DETAILS

I/We confirm that:

the Sort Code, Bank Account Number and Account Name within this application was obtained and verified by me/us in relation to the customer(s) below

Full name of regulated firm
FCA ref no.

Signed	Date
Name	
Position	

2 Personal/Company Details

Private/corporate investor(s). First named primary holder. Please see Section 3 to add additional holders.

Existing Cofunds Client Reference

Account Reference **A**

Designation (if applicable)

Mr/Mrs/Ms/Miss/Other
Surname

Full first name(s)
or company name

3 Joint Holders (All joint holders MUST complete this section)

Please include the full name and address of each holder. All correspondence will be sent to the primary holder. Joint holders must have the same investment service as the primary holder.

Second named holder

Mr/Mrs/Ms/Miss/Other
Surname
Full first name(s)

Fourth named holder

Mr/Mrs/Ms/Miss/Other
Surname
Full first name(s)

Third named holder

Mr/Mrs/Ms/Miss/Other
Surname
Full first name(s)

4 Nominated Bank Account Details

Complete this section if you have not provided us with your nominated bank account details. Please note: you will need to verify this bank account before it can be used in conjunction with your Cofunds account. If you are paying by cheque then no action is required. For all other funding options you can send a void signed cheque or three months bank statements with this application. If you are an existing customer, only complete this section if you would like to change your nominated bank account details. Any change to your nominated bank account will not be applied to your regular monthly investments.

You can only have one nominated bank account at any given time.

Name of account holder
Bank or Building Society name and address
Postcode

Branch Sort Code

Bank/Building Society Account Number

Building Society Roll Number (if applicable)

5 Authorisation (All joint holders MUST sign this form)

I authorise Cofunds to change my nominated bank account details, as indicated in Section 4. I understand that once Cofunds processes this instruction, the nominated bank account details for all of my investments will change.

Primary holder signature X Date
Capacity (if applicable)

Third holder signature Date
Capacity (if applicable)

Second holder signature Date
Capacity (if applicable)

Fourth holder signature Date
Capacity (if applicable)