wealthtime

Bank Details Form - Trusts and Corporate

We're currently rebranding from Novia to Wealthtime. You'll notice that some of our products and services still use the name Novia while we're transitioning over to the new name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

By completing this form, you are registering new bank account details with the stated Trust or Corporate account.

On receipt, our records will be updated and, once verified, will be available for future instructions. We can accept this form completed in one of the following ways:

- Signed and submitted to us via post to Wealthtime Client Services, PO Box 4328 or submitted by your financial Adviser via our secure portal, Adviser Zone.
- Digitally signed and submitted by your financial Adviser via our secure portal, Adviser Zone.

In all instances, we will require a certified copy of a UK bank statement and, if not digitally signed, we will also require a certified copy of the signatory list or where one does not exist, a certified copy of a valid driving license or passport for each individual signing the form.

We require two signatories to sign this form unless there is only one trustee/director.

Please note, we are unable to add a personal bank account to a Corporate account. The bank account must be in the name of the company.

Investor Details

Investor number:

Account number:

Investor One

Surname:

Forename(s):

Date of birth (dd/mm/yyyy):

Investor Two

Surname:

Forename(s):

Date of birth (dd/mm/yyyy):

Please note any recent change of personal details that could impact our bank verification measures:

Payment Account Details

Bank name:

Account name:

Sort Code: Account number:

Roll number:
(If applicable)

Investor Declaration

- I/We declare that my/our answers to the questions and the bank details contained in this application are true and correct to the best of my/our knowledge.
- I/We understand that checks will be performed on my/our bank, which may prompt further verification measures.
- I/We declare that the bank account provided belongs to me/us. If I/we sign this declaration by electronic signature.
- I/We confirm that this method of signature is my/our agreement to be bound as if signed by my/our manuscript signature.

Signatory One

Signature: Original signature

Date (dd/mm/yyyy):

Name:

Email:

Signatory Two

Signature: Original signature

Date (dd/mm/yyyy):

Name:

Email:

Adviser Declaration

I declare that I have witnessed the above-named Investor(s) complete this form and the bank account stated is that of the Investor(s).

Adviser name:

Adviser signature:

Date (dd/mm/yyyy):

If you require this document in an alternative format please contact us.