



Bank Details Form – Individual and Joint

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.

This form can be used to verify your bank account. Once verified, our records will be updated and there will be no need for the further verification of these details in future instructions. Please sign the declaration below using a blue or black pen.

Once completed, log in to **Adviser Zone** and submit against the client's bank details on their 'Investor Details' page in **Adviser Zone**. Alternatively, you can send the form by post to Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR.

Investor Details

Investor number:

Account number:

Investor one

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

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Investor two

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

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

Payment Account Details

Name of your bank:

Name on the account:

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 details to confirm that they belong to me/us, which may prompt further verification measures.

Failure to act on any further verification request could delay any dependent payment. For Joint Product Wrappers, at least two signatories must sign.

Signatory one print name:

Signature:

Date (dd/mm/yyyy):

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Email address:

Signatory two print name:

Signature:

Date (dd/mm/yyyy):

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Email address:

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:

Signature:

Date (dd/mm/yyyy):

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

Wealthtime is a trading name of Novia Financial plc. Novia Financial plc is a private limited company registered in England and Wales. No. 06467886. Registered office: Cambridge House, Henry St, Bath, BA1 1JS. Novia Financial plc is authorised and regulated by the Financial Conduct Authority. FCA Number 481600.