Evidence of Age Template

Use this template to provide evidence of a client's age. The template should be reproduced on your advice firm's headed paper to be accepted.

Wealthtime Classic

PO Box 2468

SALISBURY

SP2 2UH

**Client name: (Name)**

**Client number: (Number)**

I confirm that I act as an authorised representative for the above, named client and:

**Either**

I confirm I have seen the client’s **original birth certificate** and the following information shown on this document is:

**Full name at birth: (Full name)**

**Date of birth: (DD/MM/YYYY)**

In addition, for a person who has changed their name on marriage:

**I confirm I have seen the client’s original marriage certificate and their pre-marriage name matches that found on their birth certificate evidenced above:** **(Y/N)**

**Or**

**I confirm I have seen the client’s original passport and the following information shown on this document is:**

**Full name: (Name)**

**Date of birth: (DD/MM/YYYY)**

**Signature of authorised representative:**

**Date: (DD/MM/YYYY)**

**Full name: (Name)**

**Notes:**

If the client has changed name or married more than once, please enclose original evidence that links the name stated on the birth certificate with the name that the client is currently known by. Please provide this information in the same format as above.
If you’ve seen the client’s original passport then this will not be required, as the passport office has already made the
necessary checks.