Bank Details Form
Individual and joint accounts

This form can be used to verify your bank account. After we've verified your bank details, we won't need to do this again for future instructions. Please sign the declaration below using a blue or black pen. Please note this form cannot be completed using digital signatures.

For financial advisers:

Please upload the completed document in Adviser Zone. You can do this on the investor details screen.
Alternatively, please send by post to **Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR**

Investor Details

Investor 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

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: Original signature

Date (dd/mm/yyyy):

Email address:

Signatory two print name:

Signature: Original signature

Date (dd/mm/yyyy):

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: Original signature

Date (dd/mm/yyyy):

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