

Account Information Update Form

Form reference H115

Complete this form if you want to tell us about a change in the following:

- Your contact details
- Your bank account details
- Your financial adviser details

You must complete sections 1 and 5.

Complete the relevant parts of sections 2 to 4.

We will require documentary evidence to change some of the information we hold about you. Refer to H115G Account Information Update Form for details.

Quick actions:

CLEAR

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1. Member details Enter the information we currently hold about you for identification

Forename(s)

Laura

Hornbuckle plan number

DW123456

Surname

Shaw

Email

laura@email.com

Date of birth

1 8 0 5 6 4

2. Contact details Enter the information you want us to update

Title

Forename(s)

Surname

Address

Mobile number

Telephone number

Postcode

Email

Correspondence to:

You

Your adviser

Both

3. Bank account details

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Bank / building society

Newbank

Sort code

8 1 8 2 8 3

Account / roll number

0987654321

Account name

Dr Laura Smith

For non-UK accounts:

IBAN

Swift address/BIC code

4. Adviser details

Do you want to change the contact details we hold for your current financial adviser, or inform us of your appointment of a new financial adviser?

Change existing details

New financial adviser

Please enter the updated details below. You may need to ask for assistance from your financial adviser.

Adviser Name

D Royal

Adviser FCA Reference

DXR12345

Firm Name

Royalty Financial Solutions

Firm FCA Reference

RFS12345

Email

DR.RFS@email.com

If you want to change the instructions we have in place in relation to the payment of an adviser charge from your plan you will need to complete H108 Adviser Charging Form.

5. Member declarations

Please update my information in accordance with the details provided in this form.

If I have indicated in section 4 of this form that I have appointed a new financial adviser as the servicing agent in relation to my plan, I authorise Embark Services Limited to provide my financial adviser with such information about my plan as they may request from time to time.

Member Signature

Print Name

Dr Laura Shaw

Date

2 4 0 6 1 4

Checklist

CLEAR

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Before submitting this form please make sure:



You have completed all of the relevant sections of the form.



You have read and understood the guidance on completing the form contained in H115G Account Information Update Form guidance.



You have attached any supplemental documents required, as set out in the H115G Account Information Update Form guidance.

Where to send

Hornbuckle, Tyman House, 42 Regent Road
Leicester LE1 6YJ

Get in touch

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