

Change of bank details form

This form should be used to notify Curtis Banks Ltd of a change to your nominated bank details. The form must be completed in full before any change will take effect.

1 Accessing our services

If you experience difficulties accessing any of our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs. Please could you kindly provide this below.

☐ I agree to my information being processed by Nucleus Financial Platforms Group, to include being shared and gathered between relevant third parties.

Please refer to our Group Privacy Notice for Clients, should you require further guidance on how we collect use and protect your personal information. This can be found at www.nucleusfinancial.com/privacy-notice or please ask your adviser or us for a copy.

Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent, please contact the Client Management Team on 0370 414 7000 or cmt@curtisbanks.co.uk.

2 Your details

Name	<input type="text"/>
Name of scheme	<input type="text"/>
Plan number	<input type="text"/>

3 Bank account details

Please enter your new bank account details below.

Bank or building society	<input type="text"/>		
Address	<input type="text"/>		
	Postcode		
Sort code	<input type="text"/>		
Account in the name(s) of	<input type="text"/>		
Account number	<input type="text"/>	Roll number	<input type="text"/>
Payment reference	<input type="text"/>		

Notes

As part of processing this request we may require a copy bank statement showing the new bank details, this must be dated within the last 3 months for a postal statement or 1 week for an online statement.

There may be additional details we need to confirm with you in relation to the new details before any changes can take effect, we will contact you or your nominated adviser in this regard.

- You can change your bank details at any time by completing a further Change of Bank Details form.
- Curtis Banks Ltd can only make pension payments to an account held solely or jointly in the name of the member.
- Any payments made to overseas bank accounts may incur additional bank charges.

4 Declaration

- I nominate my bank details to be amended to those shown above. I understand that all future benefit payments will be paid into this account and I will notify Curtis Banks Ltd immediately if my details change or this account is closed.

Print name	<input type="text"/>
Signature of client	<input type="text"/>
Date	<input type="text"/> <input type="text"/> <input type="text"/>

Curtis Banks Limited,
3 Temple Quay,
Bristol, BS1 6DZ

T 0370 414 7000
F 0117 929 2514
curtisbanks.co.uk

Call charges will vary. We may record and monitor calls.

"Curtis Banks" is the trading name of Curtis Banks Group Limited (CBGL) (registered in England, number 07934492), Curtis Banks Limited (CBL) (registered in England, number 06758825), Suffolk Life Pensions Limited (SLPL) (registered in England, number 01180742), Suffolk Life Annuities Limited (SLAL) (registered in England, number 01011674), SLA Property Company Limited (SLAPC) (registered in England, number 01203396), Tower Pension Trustees (S-B) Limited (TPTSB) (registered in Scotland, number SC340871), Bridgewater Pension Trustees Limited (BPTM) (registered in England, number 03821053), SPS Trustees Limited (SPST) (registered in England, number 08312411), Colston Trustees Limited (CTL) (registered in England, number 06867955), Montpelier Pension Trustees Limited (MPTL) (registered in England, number 05802677), Temple Quay Pension Limited (TQPL) (registered in England, number 05679427), Tower Pension Trustees Limited (TPTL) (registered in England, number 02178783), Crescent Trustees Limited (CrTL) (registered in England, number 03915165).

"Curtis Banks Pensions" is the trading name of SLPL.

CBGL, CBL, TPTS, BPTM, SPST, CTL, MPTL, TQPL, TPTL, CrTL have their registered office at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP. SLPL, SLAL, SLAPC have their registered office at 153 Princes Street, Ipswich, Suffolk, IP1 1QJ. CBL and SLPL are authorised and regulated by the Financial Conduct Authority. SLAL is authorised as an insurance company authorised by Prudential Regulation Authority (PRA) and regulated by the FCA and PRA. CBGL, CBL, BPTL, CTL, SPSTL, MPTL, TQPTL, TPTL, CrTL and TPTS are members of a VAT group with VAT registration number 207996471. SLPL, SLAL and SLAPC are members of a VAT group with VAT registration number 241841520.

All companies are wholly owned subsidiaries of Nucleus Financial Platforms Limited (registered in England, number 06033126) whose registered office is at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP, and are members of the Nucleus Group. Further details of the Nucleus Group can be found at [nucleusfinancial.com](https://www.nucleusfinancial.com). (12/24)

