



Prudential ISA Online Services

# Customer FAQs

## Edit Your Personal Details

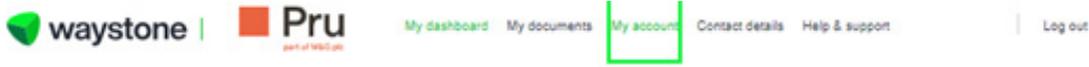
Frequently asked questions for Investors using the Prudential ISA online services digital portal



## 1.0 Edit Your Personal Details

### 1.1 HOW DO I BEGIN?

From your Dashboard, click the 'My account' button, located in the navigation bar along the top of the page.



## Dashboard

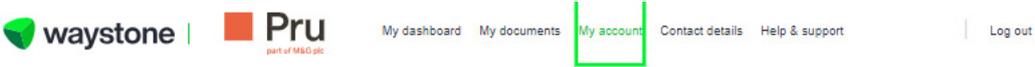
**Bank account evidence is required to verify your bank account. Any payments for withdrawal transactions will be delayed until evidence is received. Please contact us on [0344 335 8936](tel:03443358936) if you need to discuss this further. You can upload your bank account evidence [here](#).**

**Florencio Honey**  
Investor ID: 011925 [View +](#)

**Summary**

	000 000 00
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You will be taken to your 'Personal details' screen. Along the left-hand side is a menu of the different areas of your account that you can view details of and make changes to if needed.



## My account

- Personal**
- Ongoing adviser charge
- Change password
- Change memorable word
- Help

You can use this page to update your details. You can exit this screen at any time by using the back button at the bottom of the page or using the Dashboard link at the top of this page. A summary of any changes you make will be presented on the next page after you select Next. This will allow you to review your changes before submitting the changes.

**Please let us know if there are any specific factors we should take into account in the course of our relationship with you, such as health or life event related circumstances. You can [contact us](#) to update us at any time, and before doing so you may wish to read our [Dealing with Client Needs and Circumstances guide](#) which provides information on matters you may wish to consider and what help we can provide.**

### Personal details

If changes are required to your personal details, please contact our customer support team on 0344 335 8936 (Monday to Friday 8:30am - 5:30pm, excluding bank holidays) or contact your adviser.

Mrs F HONEY

Gender	Female
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## 1.2 HOW DO I ADD NEW BANK DETAILS?

On your 'Personal details' page, scroll down to the 'Bank details' section.

### Bank details

These are the bank details we will use if you choose to do a one-off withdrawal.

If you provide new bank details, you'll need to upload appropriate evidence, such as a bank statement or void cheque, to verify your bank account details. It's important you provide this or it may delay the payment of any future withdrawals. Please note we can only pay to a UK bank account in which you are named, we can't pay to a third party.

#### Bank account

example 12345677 00-00-01	▼
Bank name	example
Account type	Bank account
Name on the account	example
Sort code	00-00-01
Account number	12345677

Add new bank account

Select the 'Add new bank account' button located below your bank details. This will bring up fields for you to be able to key in your new bank details. The details must relate to a UK bank account in which you are named, not a third party.

By adding a new bank yourself, we will require appropriate evidence, such as a bank statement or a void cheque in order to be able to verify your bank account. This information is detailed on the 'What happens next' page after you submit the change of bank details.

### Bank details

These are the bank details we will use if you choose to do a one-off withdrawal.

If you provide new bank details, you'll need to upload appropriate evidence, such as a bank statement or void cheque, to verify your bank account details. It's important you provide this or it may delay the payment of any future withdrawals. Please note we can only pay to a UK bank account in which you are named, we can't pay to a third party.

Please note we can only pay to a UK bank account and cannot pay to a third party, the bank account you add must be in your name.

Bank name

Account type

Bank account  Building society

Name on account

Sort code

 -  - 

Account number

[Use existing bank account](#)

As you're adding new bank details, you'll need to provide appropriate evidence so that we can verify your bank account details.

We'll accept a bank statement dated within the last three months or a void cheque.

 The quickest way to provide this evidence is by uploading it, which you'll be able to do after you submit the request on the What happens next page.

It's important you provide this evidence or it may delay the payment of any future withdrawal.

Press the 'Next' button to proceed.

The 'Summary' page displays the new bank details you have entered. Please review your details carefully.

If the information is accurate, select the 'Next' button to proceed.

If you notice that any information is incorrect, you can navigate back by using the 'Back' button to make your corrections.

## Summary

Please review your requested changes below. It's important the information is as accurate as possible. If you wish to change these details select 'Back'.

Bank details	
Bank name	Example
Account type	Bank account
Name on account	Example
Sort code	00-00-02
Account number	12345678

## Print all application details

You can download all the details for the application.

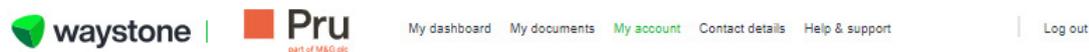
[Print application summary](#)

[Back](#)

[Next](#)

The 'Declarations' screen details the 'Terms and conditions'.

It is important that you read through the declarations carefully so you are aware of the legal contract, terms and conditions that you are agreeing to accept.



## Declarations

You must read the following declaration and acknowledge acceptance by selecting the box below.

You will not be able to submit the application until you have completed all required declarations.

### Terms and conditions

The information I have given is correct to the best of my knowledge and belief. I will inform Waystone Financial Investments Limited if any information provided changes.

**Please note:** Waystone Financial Investments Limited reserves the right to request any original documentation at its discretion which you are obliged to promptly provide. The terms and conditions are available on the Waystone website.

**Data Protection:** Where necessary, in order to provide our services to you, we will disclose your personal information (including account/transaction details) to related third parties, including the investment manager or sponsor in accordance with our privacy policy.

I acknowledge and agree that the Terms and Conditions form a legal contract that is binding on me. I accept that they may be varied at the discretion of Waystone Financial Investments Limited, as provided herein; I confirm that I have received, read and understood the ISA Terms and Conditions.

### Print declarations

You can print a copy of the declarations.

[Print declarations](#)

[Back](#)

[Submit](#)

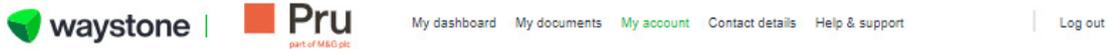
Please read in full before you tick the checkbox and select the 'Submit' button.

### 1.3 HOW DO I UPLOAD EVIDENCE SO YOU CAN VERIFY MY NEW BANK ACCOUNT?

We need to verify the new bank details you've provided. To do this, you'll need to provide a bank statement dated within the last three months, or a void cheque.

It's important you promptly provide evidence for the new bank account you've added, as it may delay the payment of any future withdrawals. You can provide this evidence by uploading it using the 'Upload document' facility.

Once you have submitted the change of bank details, the 'What happens next' page will provide information of what you need to do to upload your evidence.



## Details submitted

### What happens next

Your details have been amended. If we need anything further from you, details will be shown below.

### Your new bank details

As you have added new bank details, we now require you to upload evidence of your new bank account. You can upload a bank statement dated within the last three months, or a void cheque, and its important you provide this, or it may delay the payment of any future withdrawals. Please note we can only pay to a UK bank account in which you are named, we can't pay to a third party.

[Upload document](#)

---

[To dashboard](#)

There is an 'Upload document' button, allowing you to browse your documents on your computer to select the relevant file you wish to upload as evidence.

## Details submitted

### What happens next

Your details have been amended. If we need any more information, we will contact you.

### Your new bank details

As you have added new bank details, we now need to verify them. You can upload a bank statement dated within 3 months of you provide this, or it may delay the payment of your UK bank account in which you are named, we will contact you if we need any more information.

[Upload document](#)

#### Upload document

We are able to accept the following file type(s): PDF, JPG and PNG

**Document type**

Bank account evidence

**Choose file**

[Browse](#)

[Upload](#)

[To dashboard](#)

Use the 'Upload' button to upload the document to the online service.

## Details submitted

### What happens next

Your details have been amended. If we need any more information, we will contact you.

### Your new bank details

As you have added new bank details, we now need to verify them. You can upload a bank statement dated within 3 months of you provide this, or it may delay the payment of your UK bank account in which you are named, we will contact you if we need any more information.

[Upload document](#)

#### Upload document

Capture.PNG has been successfully uploaded

[Close](#)

[To dashboard](#)

If you are unable to upload the document at the time of submitting the application, you can do this at any time by navigating to the 'Documents' section. The 'Upload document' button is located here for you to use when you are ready.

## Documents

### Your documents

Below are all of the documents related to your account. If you need more information regarding any of these, please contact your adviser.

If you've provided new bank account details either by;

- updating these in the My details section, or
- when you submitted an application to add a new lump sum single contribution, added a regular contribution or requested a withdrawal.

You can use the Upload document option to upload a copy of a bank statement we requested as part of these processes, and must be dated within the last three months.

Successfully uploaded documents will be processed by Waystone Financial Investments Limited to verify your new bank details but will not display in Your documents.

[Upload document](#)

**Show**  
 All  6m  1y  3y  5y

**Date from**  **Date to**  [Clear](#)

**Type**  
 All  Contract note  Income voucher  Statement  Correspondence  Application Summary

**Date** **Type** **Sort by**

Date	Type	Sort by
11/09/2024	Money In Application <b>NEW</b> PruISA_MoneyIn_011926_20240911_143219.pdf	<a href="#">View</a>

[Back](#) 1-1 of 1 [Next](#)

## 1.4 HOW DO I EDIT MY ADDRESS?

On your 'Personal details' page, scroll down to the 'Address details' section. Your current registered address is displayed here.

### Address details

#### Registered address

As part of our automated application process we are required to record your permanent residential address as we'll use this address for identification purposes.

Please ensure the registered address is your permanent residential address.

If you are moving outside of the UK, please contact our customer support team on +44 (0) 344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser. If you are moving overseas we may require more evidence and will need to ascertain if your ISA eligibility is impacted in any way

#### Registered address

34 Bourn View Road  
Owen Court  
10 Foxley Lane  
Yarmouth  
South Oxfordshire  
United Kingdom  
NR24 2RL

[Edit address](#)

### Contact details

You can add or change your contact telephone number(s) and email address in the fields below. If you wish to add a telephone number outside of the UK, please contact our customer support team on +44 (0)344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser

Select the 'Edit address' button. This will bring up fields for you to be able to key in your new address details. You can either key in your new address, or use the 'Search address by postcode' button.

**Please ensure the registered address is your permanent residential address.**

**If you are moving outside of the UK, please contact our customer support team on +44 (0) 344 335 8936 (Monday to Friday 8:30am to 5:30pm, excluding bank holidays) or contact your adviser. If you are moving overseas, we may require more evidence and will need to ascertain if your ISA eligibility is impacted in any way.**

## Address details

### Registered address

As part of our automated application process we are required to record your permanent residential address as we'll use this address for identification purposes.

Please ensure the registered address is your permanent residential address.

If you are moving outside of the UK, please contact our customer support team on +44 (0) 344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser. If you are moving overseas we may require more evidence and will need to ascertain if your ISA eligibility is impacted in any way

### Line 1

### Line 2

### Line 3

### Line 4

### Line 5

### Country

### Postcode

We may use credit reference agencies like Experian to verify your new address.

[Cancel](#)

Select the 'Confirm Address' button to proceed.

The 'Summary' page replays the existing address and new address details you have entered. Please review your details carefully.

If the information is accurate, select the 'Next' button to proceed.

If you notice that any information is incorrect, you can navigate back by using the 'Back' button to make your corrections.

## Summary

Please review your requested changes below. It's important the information is as accurate as possible. If you wish to change these details select 'Back'.

My account		
	Existing	New
Address	34 Bourn View Road, Owen Court, 10 Foxley Lane, Yarmouth, South Oxfordshire, NR24 2RL, United Kingdom	34 Bourn View Roads, Owen Court, 10 Foxley Lane, Yarmouth, South Oxfordshire, NR24 2RL, United Kingdom

## Print all application details

You can download all the details for the application.

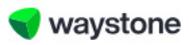
[Print application summary](#)

[Back](#)

[Next](#)

The 'Declarations' screen details the 'Terms and conditions'.

**It is important that you read through the declarations carefully so you are aware of the legal contract, terms and conditions that you are agreeing to accept.**



[My dashboard](#) [My documents](#) [My account](#) [Contact details](#) [Help & support](#)

[Log out](#)

## Declarations

You must read the following declaration and acknowledge acceptance by selecting the box below.

You will not be able to submit the application until you have completed all required declarations.

### Terms and conditions

The information I have given is correct to the best of my knowledge and belief. I will inform Waystone Financial Investments Limited if any information provided changes.

**Please note:** Waystone Financial Investments Limited reserves the right to request any original documentation at its discretion which you are obliged to promptly provide. The terms and conditions are available on the Waystone website.

**Data Protection:** Where necessary, in order to provide our services to you, we will disclose your personal information (including account/transaction details) to related third parties, including the investment manager or sponsor in accordance with our privacy policy.

I acknowledge and agree that the Terms and Conditions form a legal contract that is binding on me. I accept that they may be varied at the discretion of Waystone Financial Investments Limited, as provided herein; I confirm that I have received, read and understood the ISA Terms and Conditions.

### Print declarations

You can print a copy of the declarations.

[Print declarations](#)

[Back](#)

[Submit](#)

Please read in full before you tick the checkbox and select the 'Submit' button.

Once you have submitted the change of address details, the 'What happens next' page will confirm the change and that no additional action is required at this time.



[My dashboard](#) [My documents](#) [My account](#) [Contact details](#) [Help & support](#)

[Log out](#)

## Details submitted

### What happens next

Your details have been amended. If we need anything further from you, details will be shown below.

[To dashboard](#)

## 1.5 HOW DO I EDIT MY EMAIL ADDRESS?

On your 'Personal details' page, scroll down to the 'Contact details' section. Your email address and phone number(s) are displayed here.

### Contact details

You can add or change your contact telephone number(s) and email address in the fields below. If you wish to add a telephone number outside of the UK, please contact our customer support team on +44 (0)344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser

This is the email address linked to your digital account and is also the username you'll use each time you log in to the online service. If you provide a new email address you'll be prompted to log out and asked to log back in using your new email address.

#### Email

#### Confirm email

You can provide us with a new telephone number or update your existing telephone numbers below.

If you wish to add a telephone number outside of the UK, please contact our customer support team on +44 (0) 344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser.

#### Mobile phone number

#### Work phone number

#### Home phone number

You will need to key in your new email address twice, to ensure that it is correct.

**This is the email address linked to your digital account and is also the username you'll use each time you log in to the online service. If you provide a new email address you'll be prompted to log out and asked to log back in using your new email address.**

Select the 'Next' button to process the change.

The 'Summary' page displays the existing email address and new email address you have entered. Please review your details carefully.

If the information is accurate, select the 'Next' button to proceed.

If the information is incorrect, you can navigate back by using the 'Back' button to make your corrections.

## Summary

Please review your requested changes below. It's important the information is as accurate as possible. If you wish to change these details select 'Back'.

My account		
	Existing	New
Email	611926@linkgroup.co.uk	61192eg6@waystone.com

### Print all application details

You can download all the details for the application.

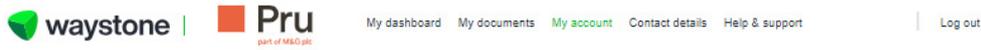
[Print application summary](#)

[Back](#)

[Next](#)

The 'Declarations' screen details the 'Terms and conditions':

**It is important that you read through the declarations carefully so you are aware of the legal contract, terms and conditions that you are agreeing to accept.**



## Declarations

You must read the following declaration and acknowledge acceptance by selecting the box below.

You will not be able to submit the application until you have completed all required declarations.

### Terms and conditions

The information I have given is correct to the best of my knowledge and belief. I will inform Waystone Financial Investments Limited if any information provided changes.

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I acknowledge and agree that the Terms and Conditions form a legal contract that is binding on me. I accept that they may be varied at the discretion of Waystone Financial Investments Limited, as provided herein; I confirm that I have received, read and understood the ISA Terms and Conditions.

### Print declarations

You can print a copy of the declarations.

[Print declarations](#)

[Back](#)

[Submit](#)

Please read in full before you tick the checkbox and select the 'Submit' button.

Once you have submitted the change of email address, the 'What happens next' page will confirm the change and that you must log out and log back in using your new email address. Select the 'Log Out Now' button to do this.



## Details submitted

### What happens next

Your details have been amended. If we need anything further from you, details will be shown below.

### Your new email address

As you have chosen to update your email address, you must now log out and log back in using your new email address as your username.

[Log Out Now](#)

## 1.6 HOW DO I EDIT MY PHONE NUMBER(S)?

On your 'Personal details' page, scroll down to the 'Contact details' section. Your email address and phone number(s) are displayed here.

### Contact details

You can add or change your contact telephone number(s) and email address in the fields below. If you wish to add a telephone number outside of the UK, please contact our customer support team on +44 (0)344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser

This is the email address linked to your digital account and is also the username you'll use each time you log in to the online service. If you provide a new email address you'll be prompted to log out and asked to log back in using your new email address.

#### Email

81192eg8@waystone.com

You can provide us with a new telephone number or update your existing telephone numbers below.

If you wish to add a telephone number outside of the UK, please contact our customer support team on +44 (0) 344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays) or contact your adviser.

#### Mobile phone number

+44

#### Work phone number

+44

#### Home phone number

+44  423502885475

[Back](#)

[Next](#)

Key in your new phone number(s).

If you wish to add a telephone number outside of the UK, please contact our customer support team on +44 (0) 344 335 8936 (Monday to Friday 8:30am to 5:30pm, excluding bank holidays) or contact your adviser.

Select the 'Next' button to process the change.

The 'Summary' page displays the existing phone number(s) and new phone number(s) you have entered. Please review your details carefully.

If the information is accurate, select the 'Next' button to proceed.

If the information is incorrect, you can navigate back by using the 'Back' button to make your corrections.

## Summary

Please review your requested changes below. It's important the information is as accurate as possible. If you wish to change these details select 'Back'.

My account		
	Existing	New
Mobile number	N/A	+44 1231 23123123

### Print all application details

You can download all the details for the application.

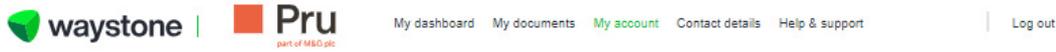
[Print application summary](#)

[Back](#)

[Next](#)

The 'Declarations' screen details the 'Terms and conditions'.

It is important that you read through the declarations carefully so you are aware of the legal contract, terms and conditions that you are agreeing to accept.



## Declarations

You must read the following declaration and acknowledge acceptance by selecting the box below.

You will not be able to submit the application until you have completed all required declarations.

### Terms and conditions

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### Print declarations

You can print a copy of the declarations.

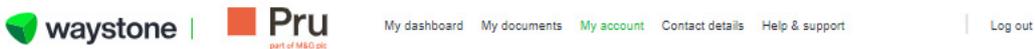
[Print declarations](#)

[Back](#)

[Submit](#)

Please read in full before you tick the checkbox and select the 'Submit' button.

Once you have submitted the change of phone number(s), the 'What happens next' page will confirm the change and that no additional action is required at this time.



## Details submitted

### What happens next

Your details have been amended. If we need anything further from you, details will be shown below.

[To dashboard](#)

### 1.7 CAN I PRINT THE APPLICATION FOR MY RECORDS?

The 'Summary' page displays the existing and new details you have entered. To print this page out for your records, select the 'Print application summary' button.

## Summary

Please review your requested changes below. It's important the information is as accurate as possible. If you wish to change these details select 'Back'.

My account		
	Existing	New
Mobile number	N/A	+44 1231 23123123

### Print all application details

You can download all the details for the application.

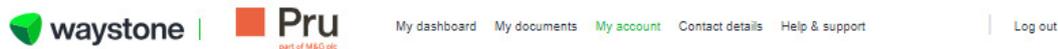
[Print application summary](#)

[Back](#)

[Next](#)

## 1.8 CAN I PRINT THE DECLARATIONS FOR MY RECORDS?

The 'Declarations' page details the 'Terms and conditions'. To print this page out for your records, select the 'Print declarations' button.



## Declarations

You must read the following declaration and acknowledge acceptance by selecting the box below.

You will not be able to submit the application until you have completed all required declarations.

## Terms and conditions

The information I have given is correct to the best of my knowledge and belief. I will inform Waystone Financial Investments Limited if any information provided changes.

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## Print declarations

You can print a copy of the declarations.

[Print declarations](#)

[Back](#)

[Submit](#)