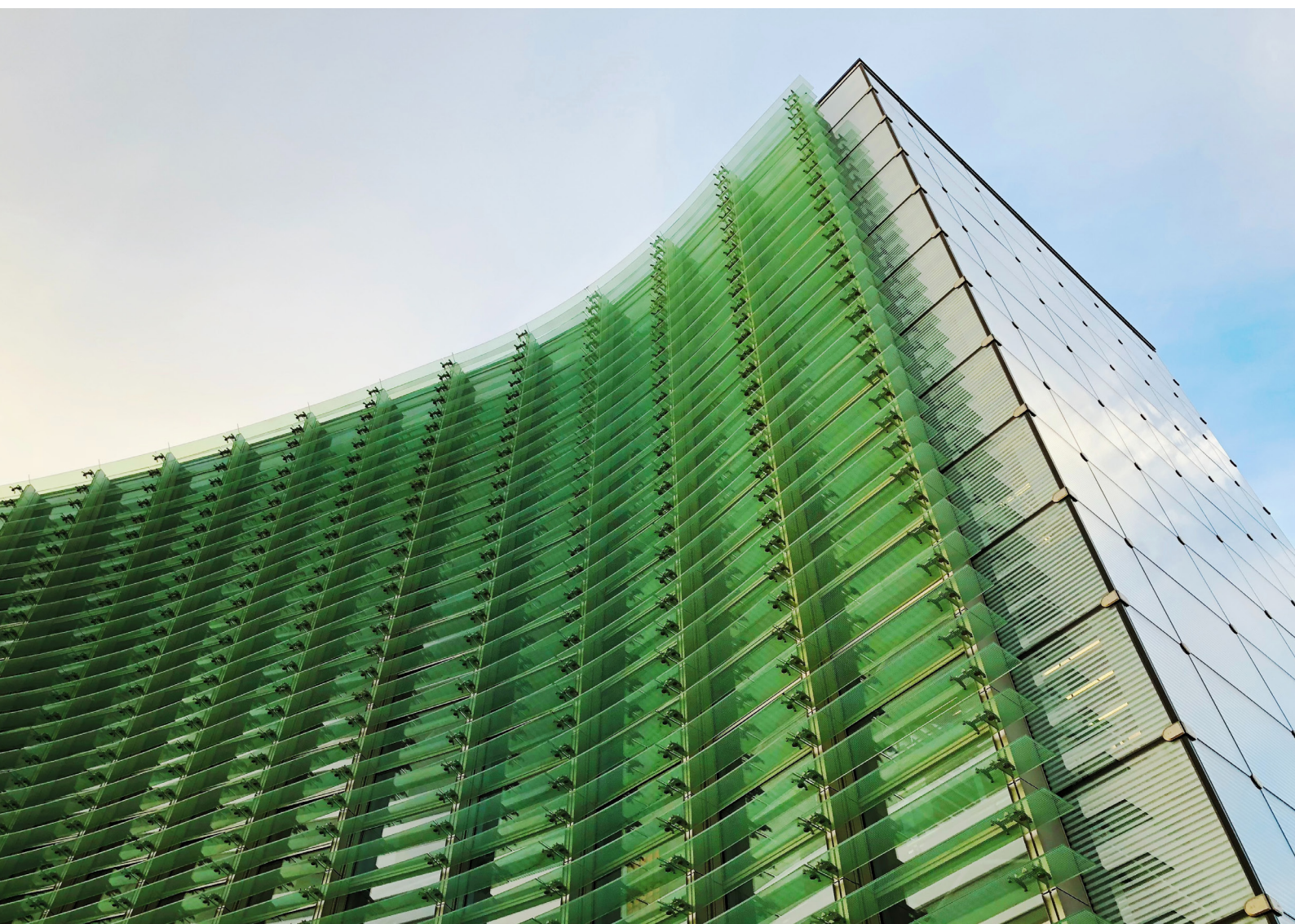




Prudential ISA

# Change of Adviser Instruction Form



Online application and account management does not affect ISA eligibility requirements, execution policy or your cancellation rights.

Registration is required for access to online services. Once registered for online access, you will be notified of any action taken on your account by you or your adviser on your behalf.

### About this form

Please return the completed form to: **Waystone Financial Investments Limited**, PO Box 384, Darlington DL1 9RZ.

**Ongoing adviser charge** – addition of, and changes to, ongoing adviser charging arrangements are made directly between you, the client, and your adviser. Your adviser should manage any changes agreed via the online portal.

## Part 1 – Investor details

Investor ID	
Investor name	
Investor address	
	Postcode

Your adviser's name			
Company name			
Company address			
	Postcode		
IRN		FRN	



waystone

## Part 3 – Change of existing adviser

### 3A. REASON FOR REQUEST

Please tick the box next to the reason for your request

Change of adviser (complete Part 3b) ☐

Release of information (complete Part 3b) ☐

Removal of adviser (complete Part 3c) ☐

### 3B. DETAILS OF YOUR NEW ADVISER

Your adviser's name

Company name

Company address

Postcode

IRN

FRN

### 3C. DETAILS OF ADVISER TO BE REMOVED

Your adviser's name

Company name

IRN

FRN

You can stop any previously agreed Adviser Charges yourself by contacting us in writing, via email or by telephone.

## Part 4 – Declaration

Would you please accept this completed form as my authority to carry out the action indicated in Part 3a above with immediate effect.

I confirm that I am receiving financial advice from the above named company (Part 3b). I also confirm that I am a UK resident for tax purposes.

I accept and confirm that the responsibility for any advice given prior to this servicing transfer must remain with that adviser.

Full name of investor

Signature

Date

D	D	M	M	Y	Y	Y	Y
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