



# Account Authorisation Form

Some clients wish for a partner, family member or a close friend to be able to give instructions on their behalf. We can accept instructions on this basis, with your consent. This form enables you, as our client, to agree to be bound by instructions given in your name by another, named individual. This authority covers the placing of instructions to buy or to sell securities on your behalf. Redmayne Bentley will be authorised to supply the individual with the necessary information to do this. This authorisation does not permit the authorised individual to withdraw assets or receive payments from the undersigned account(s). Payments can only be made to authorised bank account(s) for the account holder(s).

If you are happy with this, please complete the form and return it as soon as possible. You can, of course, cancel this authority at any time by writing to us to this effect and we will then contact you to confirm. To grant permission to the named individual to act on your behalf, please complete **ALL FIELDS in CAPITALS**, ensure both declarations are signed and return to your usual Redmayne Bentley contact.

## ACCOUNT HOLDER (including on behalf of a joint account)

Title _____ Surname _____	Country(ies) where taxed _____
First Names (In full) _____	Tax Identification Number* _____
Residential Address _____	<i>* In the UK, this is your National Insurance Number.</i>
_____	Nationalities _____ National Identifier** _____
_____ Postcode _____	_____
Tel (Day) _____	_____
Tel (Eve) _____	Occupation (previous, if retired) _____
Tel (Mobile) _____	Employer (previous, if retired) _____
Email _____	<i>**If your Nationality is British, this is your National Insurance Number; if not, or if you have dual Nationality, please see <a href="http://www.redmayne.co.uk/NID">www.redmayne.co.uk/NID</a> for further information on the details you need to provide for the National Identifier, which may be different from your Tax Identification Number.</i>
Date of Birth _____ / _____ / _____	
Country & Place of Birth _____ / _____	

## ACCOUNT HOLDER(S) DECLARATION

- The individual named overleaf will be permitted to give instructions to Redmayne Bentley to buy and sell investments on my/our\* behalf and provide/be provided with necessary information for the trade, including given online access to my/our\* account via the Client Web Access facility. Redmayne Bentley may accept instructions given by the individual as if they were given by me/us and may act on such instructions without obtaining further confirmation from me/us\*.
- I/We\* understand the authority will apply to all accounts in my/our\* name, including joint accounts.
- I/We\* understand any accounts opened in the future will be covered by this authorisation, unless I/we\* inform Redmayne Bentley otherwise.
- I/We\* will be bound by any instructions the individual gives to Redmayne Bentley. Redmayne Bentley will not be responsible for any losses that arise as a result of instructions given by the individual.
- I/We\* can cancel this authority at any time by writing to Redmayne Bentley. The individual will be authorised to give instructions on my/ our\* behalf until Redmayne Bentley has confirmed receipt of my/our\* written confirmation.

I hereby accept the above terms in relation to all accounts in my/our\* name, including joint accounts, unless stated above.

*\*Please delete as applicable.*

PLEASE SIGN HERE



\_\_\_\_\_  
PRIMARY ACCOUNT HOLDER

\_\_\_\_\_  
DATE

*Please continue overleaf...*

**AUTHORISED INDIVIDUAL**

To comply with anti-money laundering regulations, we are required to identify the individual being given authority and may check their details with fraud prevention agencies and may require evidence of their identity. The authority will not be put in place until this is confirmed.

Title \_\_\_\_\_ Surname \_\_\_\_\_ Date of Birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

First Names (In full) \_\_\_\_\_ Tax Identification Number\* \_\_\_\_\_

Residential Address \_\_\_\_\_ \*In the UK, this is your National Insurance Number.

\_\_\_\_\_ Nationalities \_\_\_\_\_ National Identifier\*\*

\_\_\_\_\_ Postcode \_\_\_\_\_

Tel (Day) \_\_\_\_\_

Tel (Eve) \_\_\_\_\_ \*\*If your Nationality is British, this is your National Insurance Number; if not, or if you have dual Nationality, please see [www.redmayne.co.uk/NID](http://www.redmayne.co.uk/NID) for further information on the details you need to provide for the National Identifier, which may be different from your Tax Identification Number.

Tel (Mobile) \_\_\_\_\_

Email \_\_\_\_\_

**AUTHORISED INDIVIDUAL DECLARATION**

- The investments in the account(s) for which the authority applies to will remain in the name of the account holder(s) and I have no legal or beneficial entitlement to the investments, any income that arises from the investments or cash held in the specified account(s).
- Redmayne Bentley may use and disclose the information contained in this form about me to make enquiries with fraud prevention agencies for verifying my identity.
- My authority is limited to giving instructions to buy and sell investments. Redmayne Bentley will not accept any other instructions on the account from me, including changing addresses or email addresses for the account holder(s), amending bank details or authorising payments from the account to a third party.

**PLEASE SIGN HERE**

 \_\_\_\_\_

AUTHORISED INDIVIDUAL \_\_\_\_\_ DATE \_\_\_\_\_

**TO BE COMPLETED BY THE OFFICE/EXEC**

All accounts to which this form applies:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

DATE COMPLETED \_\_\_\_\_