

Account Information

Update Form Guidance

Quick actions:

Document reference H115G

1. Member details

You must use this section to enter the information we already hold about you, for identification purposes. Use section 2 of the form to enter any new contact information.

Forename(s)	Your first name and any middle names.
Surname	Your last name.
Date of birth	Your date of birth in the format DD/MM/YY.
Hornbuckle plan number	Your plan number is an 8-character alpha-numeric reference that we quote on our correspondence. The plan number will either start "DW" followed by six numbers (e.g. DW123456), or with six letters followed by two numbers (e.g. ABCDEF01).
Email	The contact email address we already hold for you.

2. Contact details

You should complete this section of the form if you want to update any of your contact details. Fill in the details you want us to update.

Title	Your title as you would like it to appear on any correspondence e.g. Mr, Mrs, Ms.
Forename(s)	Your first name and any middle name. You will need to provide a copy of a Deed Poll to evidence the change.
Surname	Your last name. If your last name is changing because you have recently married or entered into a civil partnership, you will need to provide a copy of your marriage certificate or civil partnership certificate. If your last name is changing because you are getting divorced or ending a civil partnership, and you are going back to your birth name, you will need to provide your decree absolute or final order and your birth certificate. If your last name is changing for any other reason you will need to provide a copy of a Deed Poll to evidence the change.
Address and Postcode	Your new address and postcode (or ZIP code, etc.), if you have moved house recently. You will need to provide evidence of your new address. Certified copies of any of the following will suffice: <ul style="list-style-type: none">• Valid full or provisional driving licence.• Current council tax statement, demand or letter.• Current bank statement or debit/ credit card statement. Other forms of evidence are also acceptable. Contact us for further details.
Telephone number	Your preferred contact telephone number (including area code, if applicable). If you are providing a non-UK number, please also provide the relevant international dialling code.

2. Contact details cont

Mobile number	Your mobile telephone number (as an alternative contact number).
Email	Your preferred contact email address. We will use your email address to send you information relating to the administration of your plan, so you should avoid using a work email address or another address likely to be accessed by someone else.
Correspondence to	We can send correspondence relating to your plan to you or your financial adviser. Please select the option you would prefer.

3. Bank account details

If you are currently drawing a pension income from your Hornbuckle plan, and you want to instruct us to make the payments to a different bank account, you can use this section of the form to inform us of your new account details.

Bank / building society	The name of the bank or building society with which your account is held.
Sort code	The sort code of the account to which the payments should be made.
Account / roll number	The account number or roll number of the account to which the payments should be made.
Account name	The name of the account to which the payments should be made.
IBAN	For a non-UK account, the International Bank Account Number (IBAN) of the account.
Swift address / BIC code	For a non-UK account, the Swift address or Bank Identifier Code (BIC) of the bank with which your account is held.

4. Adviser details

You should complete this section of the form if you want to inform us of a change in the details of your financial adviser, or if you want to appoint a new financial adviser.

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?	Select "Change existing details" if you want to change the contact details we use for your financial adviser. Select "New financial adviser" if you want to appoint a new financial adviser.
Adviser name	The full name of your adviser as it appears on the financial services register.
Adviser FCA reference	The reference number of your adviser as it appears on the financial services register.
Firm name	The name of the adviser firm as it appears on the financial services register. If the firm is using a trading name, write the trading name as it appears on the financial services register. If the firm is an appointed representative of another regulated firm, write the name of the appointed representative (not the name of the principal firm).
Firm FCA reference	The FCA reference number of the firm.
Email	Your financial adviser's email address.

You should note that if you want to make a change to any instructions you have provided us in relation to the payment of an adviser charge from your Hornbuckle plan you will need to complete H108 Adviser charging form.

5. Member declarations

You should read this section carefully, and then sign and date the form where indicated.

Get in touch

Tel: 0844 728 9090 Fax: 0845 125 6700
clientservicing@hornbuckle.co.uk
www.hornbuckle.co.uk

Page 2