

Account Information Update Form

Form reference H115

Quick actions:

Complete this form if you want to tell us about a change in the following:

- Your contact details
- Your bank account details
- Your financial adviser details

You must complete sections 1 and 5.

Complete the relevant parts of sections 2 to 4.

We will require documentary evidence to change some of the information we hold about you. Refer to H115G Account Information Update Form for details.

1. Member details Enter the information we currently hold about you for identification

Forename(s)

Hornbuckle plan number

Surname

Email

Date of birth

D D M M Y Y

2. Contact details Enter the information you want us to update

Title

Forename(s)

Surname

Address

Mobile number

Telephone number

Postcode

Email

Correspondence to:

You

Your adviser

3. Bank account details

Bank / building society

Sort code

Account / roll number

Account name

For non-UK accounts:

IBAN

Swift address/BIC code

4. Adviser details

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?

Change
existing
details

New
financial
adviser

Please enter the updated details below. You may need to ask for assistance from your financial adviser.

Adviser Name

Adviser FCA Reference

Firm Name

Firm FCA Reference

Email

If you want to change the instructions we have in place in relation to the payment of an adviser charge from your plan you will need to complete H108 Adviser Charging Form.

5. Member declarations

Please update my information in accordance with the details provided in this form.

If I have indicated in section 4 of this form that I have appointed a new financial adviser as the servicing agent in relation to my plan, I authorise Embark Services Limited to provide my financial adviser with such information about my plan as they may request from time to time.

Member Signature

Print Name

Date

D D M M Y Y

Checklist

Before submitting this form please make sure:

You have completed all of the relevant sections of the form

You have read and understood the guidance on completing the form contained in H115G Account Information Update Form guidance

You have attached any supplemental documents required, as set out in the H115G Account Information Update Form guidance

Where to send

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Get in touch

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Page 3