

Change of details form



Cater Allen Private Bank can provide literature in alternative formats. The formats are: large print, braille and audio CD. If you'd like to register to receive correspondence in an alternative format contact us on **0800 092 3300**. If you are deaf, have hearing loss or speech loss, please use Relay UK at **relayuk.bt.com**. This is a free service that can help you communicate over the phone.

Completing this form

If you use Internet Banking, you can change your address, employment type, occupation, email address or mobile number online. Please fill in the form using BLOCK CAPITALS and black ink. Tick any boxes which apply.

Use this form to change your:

- o name
- o address
- o personal details.

Please send this form to: **Client Team, Cater Allen Operations, Sunderland, SR43 4FB**. If you need help completing this form, please call us on **0800 092 3300**.

1 Account details

Please give us details of 1 account you have with Cater Allen

Sort code

1	6	5	7	1	0
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Account number

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2 Your new details

Mr Mrs Ms Miss

Other

Male Female

First name

Middle names

Surname

Do you have any other names you are, or have been, known by?

Address

City Postcode

Nationality

Do you have dual nationality?

Yes No

If yes, please specify which country

If you're a non-UK national, please tell us the date of expiry for your VISA

D	D	M	M	Y	Y	Y	Y
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Employment status

Employed Self-employed Retired

A student A homemaker Unemployed

Occupation

Telephone

Mobile

Email address

Country of fiscal residence. This is often your country of residence and where you're employed

TIN (Tax identification number) if non-UK tax resident

Do you have to submit a personal tax return in another country because of residency or citizenship?

Yes No

If yes, please specify the countries to which you make tax contributions and include your corresponding TIN

Country

TIN

Country

TIN

3 Declaration and signatures

Once you've completed the form, you need to send it back to us, along with a valid, certified copy of proof of change. For example marriage/ civil partnership, or deed poll certificate, and evidence of your identification. To find out what we need, please view our Customer Identification Requirements document at caterallen.co.uk

I agree that the information I've given on this form will be used to update my personal details for all my Cater Allen accounts.

I'm aware that in certain cases, Cater Allen will be obliged to disclose the information of accounts and reportable people to HM Revenue & Customs (HMRC), who may share this with an overseas Tax Authority in accordance with the provisions of any law, legislation or regulation of the UK.

I confirm the information contained in this form is true and correct.

I undertake to advise Cater Allen within 30 days of any change in circumstances which affects my tax residency status or causes the information within this form to be incorrect.

Full name

Signature

Date

If you're changing your name, please also sign below with both your old and new signature.

Old signature

New signature

Date

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