

Change of customer details

This form lets you change your personal details. If you want to change your product details please use the 'Change to product details' form.

If you want to change more than one account holder on a General Investment Account (GIA) please complete one per customer.

Please complete this form in BLOCK CAPITALS and in ballpoint pen. If your intermediary has completed this form on your behalf, please check all details are correct before returning this form. Once complete, please send it, and any additional information, to ISA Ltd, 16 High Street, Kegworth, Derby, DE74 2DA

Whenever you see this icon , we're asking you to send us additional material with this form. Rather than send us an original document, send us a certified copy, please see the 'Who can certify a document and how do they do it?' FAQ on our website for how to do this.

1. Current details (as currently held by Aegon)

Customer number

3									
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Full forename(s)

Surname

For Aegon GIA only

Company name (if applicable)

Scheme name (if applicable)

Designation (if applicable)

2. New details

You only need to complete fields where your details have changed.

New name

Title

Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

or, Company name

or, Scheme name

Date of birth

D	D	M	M	Y	Y	Y	Y
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National Insurance number

Please update my National Insurance number.

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I enclose appropriate original documentation (for example a recent payslip) as confirmation.

Enclose a certified copy of the :

- Deed poll
- Marriage certificate
- Decree absolute of divorce
- Civil partnership certificate
- Company name document

Other

New client residential/company address

Postcode

2. New details – continued

New correspondence address

All correspondence will be sent to this address if provided. Please send us certified evidence of the change of address.

Postcode

We'll return any original documents you send us as evidence to the address you provide below:

Postcode

New contact details

Home phone number

Work phone number

Mobile phone number

Email

We'll use your email address and phone number to contact you about your product. We may also use them to keep you informed about our products and services but only where you've consented to this.

Change of UK tax residency

- Change of UK residency status – we may need to contact you if your new address is overseas to find out where you are registered to pay tax.

3. Client declaration

To the best of my knowledge and belief, the information I've supplied in this form, is true and complete.
If you're completing this as a company you must include a copy of the Certificate of Incorporation on Change of Name. ☒

Customer

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Print name

Signature

X	X
---	---

Additional joint holder two

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Print name

Signature

X	X
---	---

All joint Aegon GIAs holders must also sign

Additional joint holder one

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Print name

Signature

X	X
---	---

Additional joint holder three

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Print name

Signature

X	X
---	---

3. Client declaration – continued

For companies only

This section should only be completed by companies.

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Primary holder signature

X	X
---	---

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Second holder signature

X	X
---	---

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Third holder signature

X	X
---	---

Date

D	D	M	M	2	0	Y	Y
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Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Fourth holder signature

X	X
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