

1. Personal details

Client reference number ¹

Title

First name

Middle name(s)

Surname

Date of birth

D

D

/

M

M

/

Y

Y

Y

Y

2. Change of address

Existing address details

Postcode

Is this address

☐Existing
residential

OR

☐Existing
correspondence

New address details

Postcode

Is this address

☐New
residential

OR

☐New
correspondence3. Change of name ²

New details

Title

First name

Middle name(s)

Surname

When processing your request we may conduct electronic checks for security and fraud prevention purposes. These checks are based solely on the information you provide to us and so must be accurate and up-to-date. If you fail the identity and address verification checks, we will contact you to request any additional information we require from you in order to proceed.

¹ Your client reference number can be found on your Investment Report or if you have online access, in the drop down menu in the top right hand corner of your online portal account.

² Please enclose evidence* of your change of name in the form of one of the following:

- A copy of your marriage or civil partnership certificate.
- A copy of your new driving licence.
- An 'enrolled' copy of a deed poll or a copy certified by a solicitor.

* Please see our "Verify your identity" document for details on the certification process and what is required.

4. Change of email address

Existing email address

New email address

5. Change of telephone number

Please enter all current telephone numbers below. We will remove that any others that we have on file that you do not list below.

	☐ Home	☐ Mobile	☐ Work	☐ Other
	☐ Home	☐ Mobile	☐ Work	☐ Other
	☐ Home	☐ Mobile	☐ Work	☐ Other
	☐ Home	☐ Mobile	☐ Work	☐ Other

6. Change of tax and income details

Please complete the relevant sections below.

New details

Marital status ⁴

Employment status

Intended retirement age

years

OR

Intended retirement date

D D / M M / Y Y Y Y

Are you Resident for tax purposes in any other country?

☐ Yes ☐ No

Secondary country of tax residence (if applicable)

Secondary tax identification number (if applicable)

7. Change of marketing preferences

Documents will be delivered electronically where possible.

Please note that we may send certain documents to you by post for regulatory and/or security reasons.

We would like to send you information about other services or tools that we can provide that may help you and your investment choices. Please indicate below what your preference is.

How do you want to receive marketing materials?

☐ I do not want marketing materials ☐ Email ☐ Email or post

Signature

Print name (BLOCK CAPITALS)

Date

D D / M M / Y Y Y Y

⁴ Please insert appropriate

option:

- Single
- Married
- Living common law
- Divorced
- Widowed

Please enclose proof of the relevant change e.g. an original marriage certificate, civil partnership certificate, death certificate, etc. or copies provided they have been certified by a solicitor or notary.

To return this form, please scan and email it from your
registered email address to:

directinvestment@trinitybridge.com

Or you can post it using our FREEPOST address:

'freepost TRINITYBRIDGE INVESTOR SUPPORT'

Or, if signing electronically via DocuSign then click 'Finish' to submit

Our Terms and Conditions are available online, please visit:

trinitybridge.com/general-terms-and-conditions

Call us with any questions on:

0800 33 99 99 8am - 6pm, Mon - Fri excl. UK bank holidays