

Connected Person Information Access Consent Form



Redmayne
Bentley

This form enables you to provide consent to a connected person to receive information regarding your account. This authorisation does not permit the connected person to withdraw funds or provide instructions, please see our *Account Authorisation Form* for these purposes. Please note, for any financial advisers or other professional occupations with an *Intermediary Terms of Business for an Introducer Relationship* on file with Redmayne Bentley, who wish to have access to our Intermediary Web Access, please see our *Introducer Information Access Consent Form*. Please complete all fields in **CAPITALS** and return to your usual Redmayne Bentley executive.

PRIMARY ACCOUNT HOLDER

Title _____ Surname _____ First Name(s) (In full) _____

Please note, this authority will apply to all of your existing accounts and any accounts opened in the future, including joint accounts.

CONNECTED PERSON(S)

PROFESSIONALS

FINANCIAL ADVISER

Company Name _____
FCA Registration Number _____
Title _____ Surname _____
First Name(s) (In full) _____
Email _____
Address _____

_____ Postcode _____

ACCOUNTANT/OTHER PROFESSIONAL OCCUPATION

Relationship (if not Accountant) _____
Company Name _____
Title _____ Surname _____
First Name(s) (In full) _____
Email _____
Address _____

_____ Postcode _____

PRIVATE INDIVIDUALS

FIRST CONNECTED PERSON

Relationship _____
Title _____ Surname _____
First Name(s) (In full) _____
Address _____

_____ Postcode _____
Email _____

SECOND CONNECTED PERSON

Relationship _____
Title _____ Surname _____
First Name(s) (In full) _____
Address _____

_____ Postcode _____
Email _____

Redmayne Bentley Account Number (if applicable):

Please note, the account number above will be used for the CWA grouping (if requested). Please see page 2 for details.

CONSENT

Please tick the options below for which you wish to give consent to the connected person.

☐ Information – ad-hoc information may be provided to the named individual as requested.

Documentation – the following documentation will be sent to the individual.

☐ Copy documentation on request.

☐ Tax information on request (Annual Consolidated Tax Vouchers) - for Financial Advisers and other professional occupations only.

☐ Copy investment reports on request for advisory and discretionary management services only (please see copy investment reports section below).

Copy Investment Reports

Please note, if your investment reports currently contain your personal and financial information, the copies sent to a connected person(s) will also include these. If you would prefer not to retain this information within the copies which will be sent to a connected person(s) please tick the box below.

☐ I do not agree to my personal and financial information being retained within my investment reports. I understand that this means the information will not be included in my investment reports, or copies sent to connected person(s).

Client Web Access (CWA)

☐ Client Web Access Grouping

- This can only be provided if the first connected person has a Redmayne Bentley account with CWA.
- This individual may be given access to your CWA account by way of grouping it to their own CWA user account (the account number completed on page 1). This grouping is only performed on request and will not be applied automatically. Please contact us to request this. The individual is then able to view your account(s) in addition to their own, using their usual login details, as well as amend contact details and marketing/corporate actions communication preferences.
- Your login details will not be affected, and you will not be able to view the connected persons' account(s).
- Any accounts you open in the future will not be automatically added to the named individual's CWA user account by way of grouping, and only one CWA group may exist across your accounts at any one time.
- It is your responsibility to inform and ensure consent is provided by the named individual for this grouping.

DECLARATION

- The connected person will be authorised across the account(s) as per the options selected above.
- I understand the authority will apply to all accounts in my name, including joint accounts and confirm all account holders consent to this.
- I understand any accounts opened in the future will be covered by this authorisation, unless I inform Redmayne Bentley otherwise.
- I can cancel this consent at any time by writing to Redmayne Bentley. The connected person will be authorised as per the options above until Redmayne Bentley has confirmed receipt of my written confirmation.
- I have authority from the connected person(s) listed on this form to provide Redmayne Bentley with their data and confirm they have seen a copy of the *Privacy Policy* available at www.redmayne.co.uk/privacy or in hard copy upon request.

PLEASE SIGN HERE

 _____ / ____ / ____

PRIMARY ACCOUNT HOLDER

DATE