Form AM900

CHANGE OF DETAILS: ADD/CHANGE BANK DETAILS

RAYMOND JAMES

eSign

Office Details

Location Code

Wealth Manager

RSP Code

Date DD MM YYYY

Account Details

Client Name

Account Reference(s) **RK** **RK** **RK**

Request type:

☐ **ADD** the below bank details as additional bank details on my account.

- I/We understand that any regular (automated) payment requests applied on the account will go to the primary bank details only.

☐ **CHANGE** the primary bank details on my account to the below details.

- I/We understand that any regular (automated) payment requests coded on my bank account will be paid to these new details.

Primary Bank/Building Society Account Details

Bank name

Account name

Account number

Currency*: GBP, EUR, USD, other – *specify*

Sort code 00 - 00 - 00

Building Society roll no *if applicable*

SWIFT *if applicable*

IBAN *required for Euro payments*

Additional routing instructions *if applicable*
e.g. intermediary bank details

Authorisation

Account Owner 1

Full name *Please print*

Capacity — Account Owner ☐ or state capacity in which you are acting

Signature — X Please sign here — Date DD MM YYYY

Account Owner 2

Full name *Please print*

Capacity — Account Owner ☐ or state capacity in which you are acting

Signature — X Please sign here — Date DD MM YYYY

Note: *This declaration must be completed by the Wealth Manager when using our e-Signature solution – DocuSign.*

Wealth Manager Declaration

☐ **By ticking this box I confirm that:**

1. This change of bank details instruction was sent to a recognised client email address, and that this instruction on completion, has been authenticated and verified by means of:
   - an outgoing recorded telephone call with the client (which will be made available upon request);
   - to a known client contact phone number held on the account; and
   - identity was verified and authenticated via confirmation of personal information recorded on the client account.
2. I am not aware of any potential defect, impediment, or fraud in respect of the instructions received from the Client and provided to Raymond James.