RAYMOND JAMES

eSign

Trust Change of Name and/or Trustee

Please complete all sections electronically
or in BLOCK capitals using blue or black ink.

Client Name

Wealth Manager Details

Location Code

Responsibility Code

Wealth Manager

Wealth Manager Use

Existing account reference **RK**

 RAYMOND JAMES

Change of Trustee

Adding new trustee ☐ Retiring trustee from trust ☐ Both ☐

Name of Trust
Note: *If there is a new trust name, please complete the Change of Trust Name section on page 3*

	New Trustee	Retiring Trustee
Title		
Forename		
Middle name		
Surname		
Date of birth	DD MM YYYY	DD MM YYYY
Gender	Male ☐ Female ☐	Male ☐ Female ☐

Primary Residential Address

Address line 1

Address line 2

Address line 3

City/Town

Postcode

Country

Correspondence address
if different from above

Contact telephone number(s) Mobile Home

Email address

Countries of Tax Residency
state primary first

Tax Residency Identifier No.*

Are you a US Person?** No ☐ Yes ☐

Countries of Citizenship
state primary first

Nationality
state primary first

National Identifier Type:
NINO/Passport/TIN/CONCAT N ☐ P ☐ T ☐ C ☐

National Identifier No.***

Place of birth Town

Country

Occupation

* If you have a National Insurance number, this can be found on your National Insurance Card, payslip, form P45 or P60, pension order book or letters from HM Revenue and Customs or Department for Work and Pensions.

** We have limited options for US Persons. For a definition of US Person please refer to the IRS website: https://www.irs.gov/individuals/international-taxpayers/foreign-persons

*** Please be aware that the National Identifier no. can be different to your Tax Residency Identifier no.; please refer to page 18 and 19 http://ec.europa.eu/finance/securities/docs/isd/mifid/rts/160728-rts-22-annex_en.pdf

RAYMOND JAMES

Change of Trust Name

New Name of Trust

Client Access

Where you already have Client Access, this account along with any other new accounts will automatically be linked and viewable through your existing access.

Do you require access/continued access to view your accounts online? Yes ☐ No ☐

By selecting yes, you are asking Raymond James to provide you with login details to your account(s) via the Raymond James Client Access Portal. Terms and Conditions of usage will be made available to you and will need to be accepted prior to you using this tool for the first time.

Important Notes:

- *If you require Client Access please ensure you have provided an email address and at least one telephone number in the personal details section.*
- *Where you have provided more than one telephone number and one option is a mobile telephone number, the mobile telephone number will be used as the default for two-factor authentication when logging into Client Access.*

Declaration

I/We declare, I/we:

- have read this form and, to the best of my/our knowledge and belief, the information I/we have provided is correct; and
- shall notify my/our Wealth Manager immediately of any change to: i) the information in this form; ii) my/our personal circumstances; and/or iii) my/our objectives.

By completing and signing this Account Form, I/we:

- confirm I/we have been provided with *Raymond James' Terms of Business* and the *Schedule of Fees and Charges* which I/we have had the opportunity to read;
- confirm we wish to enter into the Agreement with Raymond James and understand the Agreement consists of this form, the *Raymond James' Terms of Business*, the *Schedule of Fees and Charges* and the *Rates and Charges* document; and
- consent to Raymond James validating my/our personal identification and verifying my/our address internally or through a third party.

New Trustee

Full name *Please print*

Signature X Please sign here

Date DD MM YYYY

RJIS internal use:

Check AEOI information in Nexus, if required add or remove controlling person or participants details.

Check AML, has the new owner provided AML details ☐