Updating Personal Details

InvestAcc

Please use this form to update the personal details we hold for you. Complete all sections that apply and return the form using the details at the end.

Leave a field blank if it is not changing

1. Customer Details

Full customer name
Scheme reference

2. Email address and phone number

Email address

Phone number

3. Address

1st line of address		
2nd line of address		
City	County	Postcode

Time at this address: ☐ Years ☐ Months

Home phone number	Mobile phone number
Email address	

Previous address

1st line of address		
2nd line of address		
City	County	Postcode

Time at this address: ☐ Years ☐ Months

4. Marital Status

Has your marital status changed?

☐ Yes ☐ No

If yes, tick your new marital status below.
Note that if your legal name has changed, we will require additional documentation to evidence this

☐ Single ☐ Married ☐ Civil Partnership

☐ Divorced ☐ Widowed ☐ Separated

Customer signature	Date

Or (if completed by your financial adviser on your behalf):

Financial adviser signature	Date

Name (individual adviser)
FCA authorised firm name

Once you have completed this form, send a scanned copy by email to planservicing@investacc.co.uk. Note that electronic signatures are acceptable. Or post the original to Solway House Business Park, Kingstown, Carlisle, CA6 4BY.