

Pilling & Co

Own Name Dealing Application form

Title First Names (in full)

Surname Your Pilling A/C number

Permanent Residential Address

Postcode

You must supply an email address to receive your statements, valuations, contracts and newsletters on line. Instructions will be sent to this email address on how to set up your Client Web Access (CWA). If you do not have access to a computer or an email address, paper versions are available by ticking this box.

Email

Tel Work:- Home: - Mobile: -

Only complete the following if you are a new Nominee client or you need to update your details

Your Bank details for payments to you.

Bank

Sort Code

A/C No. *8 digits only*

Customer ref (if applicable)

Date of Birth DD/MM/YYYY

Do you have a National Insurance Number?

Yes No If Yes, you must enter it below

You can find your NI number from a payslip, form p45 or p60, a letter from HMRC or the DWP, or a pension book

If you are a non-UK EU citizen please detail your Tax Identification Number (TIN) below

TIN

Registration details (if different from above)

New Clients Only: Please provide two forms of identification, one from list A, and a second from either list:

List A	List B
Valid full UK passport (or certified copy)*	Current council tax demand letter or statement
Valid full UK driving Licence (or certified copy)*	Current bank statement (not printed off the internet)
Recent evidence of entitlement to a state or local authority-funded benefit	Current credit/debit card statement (not printed off the internet)
HMRC demand/statement/notification	Utility bill from the last 3 months (not printed off the internet)

*Certified copies must be signed by a professional person such as solicitor, accountant, GP or teacher, etc.

I / We confirm that I am not a US person, resident or green card holder. If you are resident for tax purposes in a country other than the UK* please tell us here

*UK in this definition excludes Isle of Man, Jersey, Guernsey, Gibraltar and other Crown dependencies.

I agree to Pilling & Co's Terms & Conditions which are enclosed or available on request

Signed Date