Amendment to Bank Details Form

Investment Services

CAPITAL INTERNATIONAL

Account portfolio number:	
Account portfolio name:	

Please Note: *This form has been optimised for digital use to avoid as much paper waste as possible. Please download and save this file locally on your device that you are using and open with Adobe Acrobat. You do not need a paid account, but you may need to configure your digital ID for signing. To do this, please follow the on-screen steps when using the signature option in Adobe Acrobat.*

Please use this form to notify us of any amendments to the nominated bank account(s) on your portfolio.

Complete the below fields as required:

Account name:	
Bank name:	
Account number:	
Sort code or ABA (US):	
IBAN:	
SWIFT:	
Payment reference:	
Corresponding bank details, if required:	

Please Note: *We cannot accept third party bank accounts. Please only nominate bank accounts in the name of the portfolio holder.*

Rationale for changing the bank details:

If the new bank details are held in a different country to the bank details currently linked to your portfolio, please provide details of the reason for a change of jurisdiction:

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We will need to verify the requested bank details before they can be added to a portfolio. Please provide the following document when sending in this completed form:

- A proof of bank account document such as a bank statement or bank verification letter. Please note, if providing details for an alternate investment firm, we will require proof of their bank account and proof of your portfolio held with that firm.

The document should be an original or a certified copy. Further certification information, please see our website: https://www.capital-iom.com/support/certification.

Alternatively, the Selfie method can be used – a clear photograph of the portfolio holder holding a legible copy of the proof of account document, alongside an original copy. Further information can be found on our website: https://www.capital-iom.com/support/selfies.

Please note, when processing a request, we may opt for a security call back check.

Once signed, please email your completed amendment form to clientservices@capital-iom.com.

Authorised Signatories

First signature:

Full name:

Date (dd/mm/yyyy): DD — MM —

Second signature:

Full name:

Date (dd/mm/yyyy): DD — MM —

Capital International Limited

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