



Bank Details Form – Individual and Joint (Non-Advised)

We've rebranded from Novia to Wealthtime. You'll notice that some of our products and services have kept the Novia name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

This form can be used to verify your bank account. Once verified, our records will be updated and there will be no need for the further verification of these details in future instructions. Please sign the declaration below using a blue or black pen and send the form by post to Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR. Please note this form cannot be completed using a digital signature.

We will try to verify your bank account electronically. If we cannot verify your bank account, we will need further identification. Should this be required, please select your preferred verification option:

- Biometric verification** - Please provide your email address in the investor declaration section and we will issue further instructions via our biometric partner; Credas.
- Document verification** - Please provide a certified UK bank statement and a certified driving license or passport. You may submit these additional documents along with the form at the outset preventing any potential delays.

Investor Details

Investor number:

Investor one

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Investor two

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Please note any recent change of personal details that could impact our bank verification measures.

Payment Account Details

Name of your bank:

Your name as it appears on your account:

Sort code:

Account number:

Roll number (if applicable):

Investor Declaration

- I/We declare that my/our answers to the questions and the bank details contained in this application are true and correct to the best of my/our knowledge.
- I/We understand that checks will be performed on my/our bank details to confirm that they belong to me/us, which may prompt further verification measures.

Failure to act on any further verification request could delay any dependent payment. For Joint Product Wrappers, at least two signatories must sign.

Signatory one print name:

Signature: Date (dd/mm/yyyy):

Email address:

Signatory two print name:

Signature: Date (dd/mm/yyyy):

Email address:

If you require this document in an alternative format please contact us.

Wealthtime is a trading name of Novia Financial plc. Novia Financial plc is a private limited company registered in England and Wales. No. 06467886. Registered office: Cambridge House, Henry St, Bath, BA1 1JS. Novia Financial plc is authorised and regulated by the Financial Conduct Authority. FCA Number 481600.