

Please call your Adviser if you have any questions about completing this form, or call Courtiers on +44 (0)1491 578368

You may give authority for another person (the third party) to access your portfolios through their Courtiers online account, allowing the third party to:

[please tick as appropriate]

☐ View Plans and Assets, this includes:

- Viewing the value of your investments (current and historical)
- Viewing fund and portfolio performance, and holdings
- Updating the value of your assets and plans, which you have added to your online account
- Receiving and storing valuation statements and other documents received directly from Courtiers
- Sending us messages on your behalf – directly and securely
- View transaction history (*function anticipated to be available by 30 April 2024*)

☐ Access and amend your personal data

If, at any point in the future, you no longer wish for the third party to access your portfolios through their Courtiers online account, please inform your Courtiers adviser who will arrange for access to be revoked.

Important Information

You are not authorising the third party to give investment instructions or to make investment decisions on your behalf.

INFORMATION ABOUT THE THIRD PARTY

Full Name

Permanent Residential Address

Email Address

DECLARATION

I give authority for the person named above to access all of my Courtiers portfolios through their Courtiers online account, in accordance with the instructions given above.

Full Name

Permanent Residential Address

Signature

Date