



Power of Attorney Registration Form

Application guide

This form should be completed by a person who has been appointed as attorney and is enabled to act individually on behalf of a James Hay Partnership client under a Power of Attorney. This form is required so that we can fulfil our Anti-Money Laundering responsibilities in respect of the attorney.

For instances where two or more attorneys are being appointed, a separate form is required for each attorney.

Sections A, B, E and F must be completed.

If you have been appointed as an attorney in a personal capacity please also complete Section C.

If you have been appointed as an attorney in a professional capacity please also complete Section D.

You must enclose copies of the following documents:

- Documents to verify your identity. Please see the 'Additional documentation required' section.
- Confirmation of the appointed Power of Attorney. We can accept the lasting power of attorney access code, which is to be provided in Section E. We can also accept the original Power of Attorney document, or a certified copy (to be certified on each page). In accordance with gov.uk/power-of-attorney/certify, a copy of a lasting power of attorney can be certified by a solicitor or by 'a person authorised to carry out notarial activities'. The document should be certified by a Financial Conduct Authority (FCA) regulated company or a solicitor.

We will not be able to proceed with your registration without this additional information.

Please complete this form in BLOCK CAPITALS and return it to James Hay, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB. If you need any help with completing this form, please call your Customer Support Team or our general enquiry number 03455 212 414.

A Client details Attorney to complete

Full name of the client for whom you have the Power of Attorney

James Hay Partnership product i.e. Modular iSIPP, Wrap

James Hay Partnership product number(s)/Wrap client number(s)

B Your details Attorney to complete

Title

Forename

Surname

Any other name you have been, or are, known by

Date of birth

Permanent residential address

Postcode

Nationality

B Your details (continued)

Attorney to complete

Is your country of residence the United Kingdom? Yes No

If 'No' please specify

Do you have dual nationality? Yes No

If 'Yes' please specify

C Personal attorney home address

Attorney to complete

Home address (personal attorney only)

<input type="text"/>
<input type="text"/>
Postcode

D Professional attorney business address

Attorney to complete

Business address (professional attorney only)

<input type="text"/>
<input type="text"/>
Postcode

Regulatory number

Name of regulator/professional body or society's website

E Lasting power of attorney access code

Attorney to complete

Please provide us with the lasting power of attorney access code. The access code starts with a V and is 13 characters long. For example - V-GH23- IJ45-KL67.

V													
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If the lasting power of attorney access code is not provided above, please tick to confirm that the original or certified copy of the Power of Attorney document is enclosed or has been provided.

F Declaration (Please read carefully)

Attorney to complete

Data Protection Statement

You can access full details on what to expect when we process your personal data under your product in the Data Protection Statement - James Hay Products document, which is available on our website at jameshay.co.uk or by calling us on 03455 212 414. If you have any questions about data protection, please contact us using the contact details in the Data Protection Statement.

At James Hay, we conduct market research to improve our products and services. Please tick this box if you do not wish to receive invitations to participate

You can change your mind at any time by contacting us.

It is an offence to make false statements and the penalties are severe and could lead to prosecution.

By signing this Declaration I am agreeing to its contents.

Attorney's signature

Date

D	D	M	M	Y	Y	Y	Y
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Additional documentation required

If you have a financial adviser, they can verify your identity by completing a 'Confirmation of Verification of Identity' form. If you do not have a financial adviser, you will need to supply us with appropriate documentation from the lists below.

Please send photocopies of the documentation to us at James Hay, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB.

If you require any assistance, please call our Customer Support Team or our general enquiry number 03455 212 414.

Copies of supporting literature and forms are available at jameshay.co.uk

EVIDENCE OF YOUR IDENTITY

Black and white photocopies of two documents - one from list A and one from list B. Items from the same source cannot be used twice.

List A

- Unexpired passport
- Unexpired UK old style driving licence (not provisional)
- Unexpired UK photocard driving licence
- Firearms certificate or shotgun licence
- EEA or Switzerland National identity card
- Northern Ireland voters card.

List B

- Unexpired UK old style driving licence (not provisional)
- Unexpired UK photocard driving licence
- Council tax bill dated within the last 12 months
- Firearms certificate or shotgun licence
- Credit card or bank statement dated within the last three months (not internet printed)
- Utility bill dated within the last three months (not mobile phone, satellite/cable TV or internet printed bills)
- HM Revenue & Customs coding/assessment/statement/tax credit
- Northern Ireland voters card.

Checklists

PERSONAL ATTORNEY CHECKLIST

- Have you completed Section A?
- Have you completed Section B?
- Have you completed Section C?
- Have you completed Section E?
- Have you signed and dated Section F?
- Have you enclosed evidence of identity?
- Have you enclosed or already sent a certified copy of the Power of Attorney?

PROFESSIONAL ATTORNEY CHECKLIST

- Have you completed Section A?
- Have you completed Section B?
- Have you completed Section D?
- Have you completed Section E?
- Have you signed and dated Section F?
- Have you enclosed or already sent a certified copy of the Power of Attorney?

We are able to provide literature in alternative formats. For a Braille, large print, audio or E-text version of this document call us on 03455 212 414 (or via the Typetalk service on 18001 03455 212 414).

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