

Certification of Documents



There are many instances where providing original documentation is just not practical. Instead, we can accept certified copy documents providing the following certification guidelines are met.

Example certification

I hereby certify this to be a true copy of the original.

Signed by: *Adam Smith* Dated: 28 March 2024

ADAM SMITH, Financial Adviser, ABC Adviser Company Limited

All copy documents must be certified as a true copy of the original and the name of the person certifying must be clearly and legibly printed. The capacity under which the suitable certifier is signing must be provided. All documents must be certified once with an original wet signature.

Suitable certifiers

- An authorised representative of an embassy or consulate of the country who issued the identification document;
- A notary public;
- A commissioner for oaths;
- A lawyer or advocate;
- A formally appointed member of the judiciary;
- A registrar or other civil or public servant authorised to issue or certify copy documents;
- A Financial Conduct Authority (FCA) authorised financial adviser.

Points to note

- If there's a document with multiple pages e.g. a Will, we can accept the certification on the first page unless the document relates to an Offshore Bond application. In this case RL360 requires the certifier to sign and date the copy document on all pages.
- We can't accept a certified copy of a certified copy - the certified copy must be based on the original document.
- We can't accept a certified copy of a Grant of Probate.
- When photocopying any document please ensure the photocopy is true to size. We're unable to accept copies reduced in size. You should also ensure the copy is legible.

We must have the original of the Grant of Probate/Certificate of Confirmation - this must bear the seal of the court.

We can accept either an original or a certified copy of the following documents

- Authorised signatory list
- Birth certificate
- Court of protection
- Death certificate
- Deed poll (change of name)
- Fixed/individual/enhanced protection certificate
 - Please note that for clients who have an electronic protection certificate we can accept a screenshot of their HM Revenue & Customs (HMRC) record
- Interim death certificate (this is issued when the cause of death is being established by a coroner)
- Last Will
- Marriage certificate
- Pension sharing order and annex
- Power of attorney
- Trust deed (excluding Nucleus trust deeds)

When sending certified documents to us, these can only be accepted in the post, secure message or via our online digital service. Please do not send these to us by email as they will be rejected.

If you need help or information, please speak to our Customer Support Team on **03455 212 414**, Monday to Friday between 8.30am and 5.30pm.

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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