

# **Columbia Threadneedle Investment Trusts**

You can use this form to authorise Columbia Threadneedle Investments (Columbia Threadneedle) to disclose details of your account to another person. Please complete Part 1 and ask the person you wish to be able to access details of your account to complete Part 2. They will be able to access details of your account by letter or telephone. Please complete this form in block capitals and black ink.

Please return the form to:

Columbia Threadneedle Management Limited PO Box 11114 Chelmsford CM99 2DG

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## **Part 1** Personal details (Please complete your details below)

Please ensure you supply all information requested below. Without the full information your account may be restricted - all fields marked with an \* are required.

Your account number	Date of birth*	Nationality*	National Insurance number*						
Title (Mr/Mrs/Miss/Ms/Other)* First	name(s) in full*	Surr	name*						
Permanent residential address*									
		Postcode*	Country						
Telephone		Email address							
Account holder signature									
I authorise Columbia Threadneedle to	provide details on this account to the pe	rson named in Part 2 at their reque	st. Date						
Part 2 Additional contact de	etails								
Title (Mr/Mrs/Miss/Ms/Other)* First	name(s) in full*	Suri	name*						
Permanent residential address*									
		Postcode*	Country						
Telephone		Email address							
Date of birth*	Nationality*	National Insurance number*							
			1 1 1						
Additional contact signature									
I agree to Columbia Threadneedle ho	olding my personal details for the opera	tion of this account only.							

I understand access to the account is subject to the Plan Terms and Conditions and that I am not able to give any instructions on this account.

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### Data Protection

All personal information submitted with this application form will be treated in accordance with Columbia Threadneedle Management Limited's Privacy Policy, which is available at: **ctinvest.co.uk/privacy**. This privacy policy includes full details about the type of information we collect, what we use this information for, and your related rights.

Date

In addition, the Key Features and Terms & Conditions document for the selected account contains a summary of the key information about how we process your personal information. Should you have any questions regarding how we process your personal information key contact information can be found both in the Privacy Policy and the Terms & Conditions document.

#### Marketing

We would like to provide you with details of financial services and products that we offer which we think you might find interesting. If you would NOT like to receive such information, please tick this box . If at any time you change your mind, please let us know by emailing us at preferences@ columbiathreadneedle.com.



## **Columbia Threadneedle Management Limited**

0345 600 3030, 9:00am – 5:00pm, weekdays, calls may be recorded or monitored for training and quality purposes.