

# Adding or removing an account holder



## CT General Investment Account (GIA) CT Junior Investment Account (JIA)

You can use this form if you would like to add or remove one or more account holders on an existing CT General Investment Account (GIA) or a CT Junior Investment Account (JIA).

It is possible to have a maximum of four account holders at any one time.

Please note that, if an account is transferred from single to joint ownership, online access will be restricted to view-only access.

**Please note** - Any future documentation (including reprints) will show the new account holder details even where they were not the holders at the time of transaction.

- This form should not be used to change the beneficial owner of the account

If this does not meet your requirements, we can transfer the shares

currently held into a new account in the name of the new account holder instead. Please contact us if you wish to discuss this further.

The current owner(s) should complete and sign Part 1 and the new owner, where applicable, completes Parts 2 and 3.

Please email our Investor Services Team at [investor.enquiries@columbiathreadneedle.com](mailto:investor.enquiries@columbiathreadneedle.com) or call 0345 600 3030\*\* if you have any queries.

**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

24DLU/1  
05/24

### Part 1 Current account details

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

Account number

Designation (if applicable)

Full name of first account holder\*:

Tick here to remain on the account

Tick here to be removed from the account

Permanent residential address (including postcode)\*

Postcode

Nationality\*

Date of birth\*

National Insurance number\*

Full name of second account holder (if joint)\*:

Tick here to remain on the account

Tick here to be removed from the account

Permanent residential address (including postcode)\*

Postcode

Nationality\*

Date of birth\*

National Insurance number\*

**Part 1** Current account details (continued)

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

Account number           Designation (if applicable)

Full name of third account holder (if joint)\*:  Tick here to remain on the account  Tick here to be removed from the account

Permanent residential address (including postcode)\*   
 Postcode

Nationality\*  Date of birth\*         National Insurance number\*

Full name of fourth account holder (if joint)\*:  Tick here to remain on the account  Tick here to be removed from the account

Permanent residential address (including postcode)\*   
 Postcode

Nationality\*  Date of birth\*         National Insurance number\*

I/We request that, where indicated, the above account holder(s) should be removed from this account. I/We agree that any person noted in Part 2 of this form should be added to the account.

Signature (first account holder): <input type="text"/>	Signature (second account holder, if required): <input type="text"/>
Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Signature (third account holder, if required): <input type="text"/>	Signature (fourth account holder, if required): <input type="text"/>
Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

**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](http://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.

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](mailto:preferences@columbiathreadneedle.com).

**Part 2** New account holder details

Please ensure you supply your address, Date of birth, Nationality and National Insurance number - all are required to open your plan. Should you wish to add more than two new account holders please download the 'Multi Applicant Form' by visiting [ctinvest.co.uk/documents](http://ctinvest.co.uk/documents)

**First new account holder**

Title (Mr/Mrs/Miss/Ms/Other)

First name(s) in full

Surname

Permanent residential address

  
  
  

Postcode

Email address

Telephone

Nationality\*

Date of birth\*

National Insurance number\*

**Second new account holder**

Title (Mr/Mrs/Miss/Ms/Other)

First name(s) in full

Surname

Permanent residential address (if applicable)

  
  
  

Postcode

Email address

Telephone

Nationality\*

Date of birth\*

National Insurance number\*

### Part 3 Individual Self-Certification/Declaration - to be completed by the new account holder(s)

#### Tax residency

Tax regulations<sup>1</sup> require us to collect information about each investor's tax residency<sup>2</sup>. In certain circumstances (including if we do not receive a valid self-certification from you) we will be obliged to share information about your account(s) with His Majesty's Revenue & Customs (HMRC) who may in turn share this information with any or all participating tax jurisdictions<sup>3</sup>.

Please indicate all countries in which you are resident for tax purposes and your associated Tax Identification Number(s) in the table below. If you have any questions about your tax residency<sup>2</sup>, please contact your tax adviser.

Name	Country/Countries of Tax Residency	Tax Identification Number <sup>4</sup>

<sup>1</sup> The term "tax regulations" refers to the International Tax Compliance Regulations 2015 which implements the Foreign Account Tax Compliance Act (FATCA) and the OECD Common Reporting Standard for Automatic Exchange of Financial Account Information (CRS).

<sup>2</sup> In general, you are a Tax resident where you are liable to taxes, based on where you live and work permanently although different jurisdictions have different rules in relation to tax residency. If in doubt, please contact your tax adviser.

<sup>3</sup> Those countries that have agreed to exchange information under FATCA and the CRS1.

<sup>4</sup> If you are a UK Tax resident and not a Tax resident anywhere else and also not a US citizen, you are not required to provide details of your 'Tax Identification Number' or 'Date of Birth', or if you are not resident in a jurisdiction that is reportable under CRS or FATCA and also not a US citizen, you are not required to provide your 'Tax Identification Number' or 'Date of Birth'.

#### Declaration

I/We declare that the information on this completed application form is correct to the best of my/our knowledge.

I/We confirm that I/we have read the Key Features of the CT General Investment Account / CT Junior Investment Account.

I/We confirm that I/we have read the latest Key Information Documents for the selected investment trust(s).

I/We have read and understood the Pre-Sales Cost disclosure(s) for the selected investment trust(s) and savings plan.

I/We agree to be bound by the Terms & Conditions relating to the plan.

I/We understand that this application is subject to acceptance by Columbia Threadneedle.

I/We declare that I/we are not a US Person.

I/We agree to notify Columbia Threadneedle Management Limited immediately if any of this information changes in the future.

Full Name (First New Account Holder):

Signature:

Date

Full Name (Second New Account Holder) (if applicable):

Signature:

Date



#### Columbia Threadneedle Management Limited

ctinvest.co.uk

\*\*0345 600 3030, 9.00am - 5.00pm, weekdays, calls may be recorded or monitored for training and quality purposes.