

Changes to your personal details form

BMO Investment Trusts

If your personal details have changed, please let us know by completing and returning this form.

Please complete this form in block capitals and black ink.

Please return the form to:

BMO Asset Management Limited
PO Box 11114
Chelmsford
CM99 2DG

21DLU/1
06/21

Part 1 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.

Your name(s)*	<input type="text"/>	Your account number*	<input type="text"/>
Date of birth*	<input type="text"/>	Nationality*	<input type="text"/>
<input type="text"/>	<input type="text"/>	National Insurance number*	<input type="text"/>

Part 2 Change of contact details

Previous address	<input type="text"/>	Postcode	<input type="text"/>
Date moved into new address	<input type="text"/>	New address*	<input type="text"/>
<input type="text"/>	<input type="text"/>	Postcode	<input type="text"/>
Telephone	<input type="text"/>	Email address	<input type="text"/>

Where a child for whom the CTF/ JISA account has been set up is under 16 years of age, postal instructions received from the Registered Contact to update their address will result in the address details for both the Registered Contact and the child being updated unless we are advised otherwise.

Signatures of account holder moving to this address

<input type="text"/>	Date	<input type="text"/>
----------------------	------	----------------------

If you are moving to an address in the USA then please contact us rather than completing this form as we may require some further information from you.

Part 3 Change of name

If your name has changed you will also need to send us documentary evidence such as your marriage certificate. We cannot accept photocopies.

New name

Title (Mr/Mrs/Miss/Ms/Other)	First name(s) in full	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

Previous name

Title (Mr/Mrs/Miss/Ms/Other)	First name(s) in full	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

New signature

Old signature

Date

Part 4 Data Protection

All personal information submitted with this application form will be treated in accordance with BMO Asset Management Limited's Privacy Policy, which is available at: bmoinvestments.co.uk/privacy-policy. 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@bmogam.com.



BMO Asset Management Limited

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

BMO Asset Management Limited is authorised and regulated by the Financial Conduct Authority and is a member of BMO Global Asset Management EMEA of which the ultimate parent company is the Bank of Montreal. L18_06/21