

Request for income payments by direct credit



This form can be used to change:

- your income instruction from reinvestment of income to purchase more shares, to income payment by direct credit; or
- your income payment method from cheque to direct credit.

Please complete this form in blue or black ink, using CAPITAL letters and ticking the appropriate boxes.

1 Personal details

Please give the full name of all investors and the primary holder's registered address.

Your M&G client reference (current M&G investors)

Designation (if applicable)

Investor 1

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Date of birth

Forename(s)

Phone: Home

Surname

Mobile

Permanent residential address

Work

Postcode

Email

Investor 2 (if applicable)

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Date of birth

Forename(s)

Surname

Investor 3 (if applicable)

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Date of birth

Forename(s)

Surname

Investor 4 (if applicable)

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Date of birth

Forename(s)

Surname

2 Your investment details

If you would like to receive future income payments for all funds you hold within a product category, please tick the relevant box(es) below:

Stocks and shares ISA ☐ Ex Mini ISA ☐ APS ISA ☐ Ex PEP ISA ☐ OEIC ☐

Alternatively, if you do not wish to apply this to all funds within a product category, please list below those from which you would like to receive income payments. If you do not specify the share class, this request will apply to all share classes held in that fund.

Income will be paid directly into the bank or building society account you specify overleaf. If you would like income payments to be paid into separate bank accounts, please contact us via one of the methods listed on page 3.

Full name(s) of fund(s) chosen	Share class (eg A, A-H, R*)	Product type				
		Stocks and shares ISA	Ex Mini ISA	APS ISA	Ex PEP ISA	OEIC
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Please use another sheet of paper if you need more space to list your choice of funds. *For advised clients only.

3 Receiving income by direct credit

Please note that M&G does not accept any responsibility for the bank/building society account details you give here; you give these details entirely at your own risk so please check that they are correct.

Name and full postal address of your bank or building society

Bank or building society
Address
Postcode

Bank or building society account number

Branch sort code

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Building society reference/roll number (if applicable)

Name(s) of account holder(s)

! Verification required when providing bank or building society details

Before we can use this information to set up any new payments, we need to perform a couple of additional checks in order to verify the bank or building society details you have provided.

If these are unsuccessful we will contact you to request one of the following documents, however you may prefer to send one of the below documents when returning this completed form:

- A voided cheque. This is simply a blank cheque that you have struck through with the words VOID.
- An original bank or building society statement or a printed PDF copy of an online bank statement detailing your address and full name as the account holder (no older than three months).
- A giro or paying in slip for your bank or building society account.
- Letter from your bank or building society, original or certified copy on headed paper, and dated in the last three months. The letter should include your sort code, account number, name and address.

4 Data protection and privacy

We collect personal data from you for the purposes of administering your investment.

At M&G we are committed to protecting your privacy. To learn more about how we process your personal data please refer to our Privacy Notice available at www.mandg.co.uk/privacynotice.

5 Declaration and authorisation

I/We authorise M&G Securities Limited to make payments of income arising from my/our holding in the product(s)/fund(s) specified in Section 2 by direct credit transfer to the bank/building society account shown in Section 3.

If the holding is registered in the name of a corporate body or charity, two authorised signatories need to sign below, stating their capacity, eg Director/Secretary/Treasurer etc.

Investor 1 Signature
Capacity (if applicable)
Investor 2 Signature (if applicable)
Capacity (if applicable)
Investor 3 Signature (if applicable)
Investor 4 Signature (if applicable)

Date	D	D	M	M	Y	Y	Y	Y
Date	D	D	M	M	Y	Y	Y	Y
Date	D	D	M	M	Y	Y	Y	Y
Date	D	D	M	M	Y	Y	Y	Y

! Returning your form

Please send your completed application form to: **M&G Securities Limited, PO Box 9039, Chelmsford CM99 2XG.**

Checklist

- ☐ Have you read, signed and dated the Declaration and authorisation? This form will not be accepted without this section completed.
- ☐ Have you provided your date of birth in Section 1?
- ☐ If you have chosen to do so have you included the information to verify your bank or building society details?

How to contact us

Call us

 **0800 390 390**

We are open Monday to Friday from 08:00 to 18:00 and on Saturday from 09:00 to 13:00. For your security and to improve the quality of our service, we may record and monitor telephone calls.

Visit our website


 **www.mandg.co.uk**

Email us

 **info@mandg.co.uk**

Please note that information in an email cannot be guaranteed as secure. Do not include sensitive information in emails to M&G.

Write to us

 **M&G Customer Relations
PO Box 9039
Chelmsford
CM99 2XG**

