[**www.nsandi-adviser.com**](http://www.nsandi-adviser.com)

**0800 092 1228**



Letter of Authority

**National Savings**

**and Investments**

**Glasgow**

**G58 1SB Customer Name:**

**1st Line of Address:**

**2nd Line of Address:**

**Postcode:**

**NS&I Number (if known):**

**Or NS&I Customer Number(s):**

Dear NS&I,

I am writing this letter to indicate that I authorise ………………………………………………………………............ ………………………………………………………………………………………………………………………………………………………… **<Name of Financial Adviser or Name of Financial Advice firm or Solicitor or Accountant >** (hereby named as My Adviser(s)) to be provided with information held by NS&I about my savings with you.

 I understand this information could include balances, valuations, ad-hoc and annual statements, maturity dates, confirmation of transactions processed, transaction progress updates, the current customer account details you hold on file about me.

My Adviser(s)should be given these details from …………….(**starting date**) until I contact you to revoke this authority. NS&I will contact me every two years to confirm the instruction is still valid and I will need to respond otherwise the authority will be suspended until I confirm it should remain active. It is my responsibility to update NS&I as soon as my relationship with the Adviser(s) ends.

I am aware My Adviser(s)will need to prove their identity when contacting NS&I to obtain information on my accounts, and that this will be done by confirming details held on the Financial Conduct Authority’s database (the industry regulator) and NS&I’s records, including address and date of birth.

My Adviser(s)will provide NS&I with the names of the individual Financial Advisers dealing with my finances and will also notify NS&I in writing if these names change.

Currently information can only be obtained by My Adviser(s)calling the Adviser Helpline on 0800 092 1228, or via post.

**Customer Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Customer Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



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…………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………

**<Name of Financial Adviser or Name of Financial Advice firm or Solicitor or Accountant>**

Details of Financial Adviser(s) acting on behalf of ……………………………… **<customer name>**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Date of Birth** | **FCA Registered Address** | **FCA Number** | **Signature** |
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**Please post both sheets to NS&I, Glasgow, G58 1SB**