National Savings

and Investments

Glasgow

G58 1SB

**Customer Name:** Click here to enter text.

**1st Line of Address:** Click here to enter text.

**2nd Line of Address:** Click here to enter text.

**Postcode:** Click here to enter text.

**NS&I Number (if known):** Click here to enter text.

**Or NS&I Account Number(s):** Click here to enter text.

Dear NS&I,

I am writing this letter to indicate that I authorise **[Name of Financial Advice firm or name of Individual Financial Adviser or Solicitor or Accountant]** Click here to enter text.,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]** Click here to enter a 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, date of birth and my NS&I Number/Account Number/Case Reference.

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:** Click here to enter text.

**Date:**Click here to enter a date.

**Complete the table below with details of all unique Advisers that will need to act on the customer’s account. All advisers need to be recorded on the FCA Register.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Financial Advisers Name** | **Financial Advisers Date of Birth** | **Financial Advisers FCA Registered Address** | **Financial Advisers FCA Number** | **Financial Advisers Signature** |
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**Please post both sheets to NS&I, Glasgow, G58 1SB allowing up to a week for the checks to be completed and the authority registered. A confirmation letter will then be sent to the first named adviser and the customer containing a unique reference number.**