



Individual letter of authority for third party access

Instructions for completing this form

Please complete:

- Part A and part B
- Your adviser should complete part C
- Sign part D

Data protection

To provide this product or service, we will need to collect some personal information about you or other individuals named on this form. Where providing personal information of other named individuals, you confirm that you have the necessary permission to do so. We may need to share this personal information with other companies of Aberdeen Group plc and companies who support us in the provision of this product or service. All personal information will be processed only where it is fair and lawful to do so. Whenever we share personal information, we will do so in line with our obligations to keep personal information safe and secure.

Please read our **Privacy Notice** which explains in more detail how we use personal information and your rights under data protection law.

Part A – Policyholder (s) details

Policyholder 1 name	<input type="text"/>		
Date of birth (DD/MM/YYYY)	<input type="text"/>		
Policyholder 2 name	<input type="text"/>		
Date of birth (DD/MM/YYYY)	<input type="text"/>		
House name or number	<input type="text"/>		
Street	<input type="text"/>		
City/Town	<input type="text"/>		
County	<input type="text"/>	Postcode	<input type="text"/>
Contact number	<input type="text"/>		
Policyholder 1 NI No.	<input type="text"/>	Policyholder 2 NI No.	<input type="text"/>
Email address	<input type="text"/>		
Wrap number	<input type="text"/>	<input type="text"/>	<input type="text"/>

I / we authorise the adviser detailed in Part C to have access to the Wrap account detailed in Part A and all policies within that Wrap account. This Letter of Authority will remain in place until I / we cancel it in writing.



Part B – Authorisation to provide new adviser or third party access to policy information only

Do you require a retirement quote?

If so, please provide required Normal Retirement Date (DD/MM/YYYY)

Please provide general policy information only:

These instructions will apply to the Wrap account detailed in part A and all policies within that Wrap account.

Part C – Adviser information (to be completed by your new adviser)

(Please complete all the fields in this section)

Adviser firm name

Adviser name

Your agency code

FCA reference

Email address

Phone number

If there is more than one Wrap enabled platform please state which one:

Register as an Intermediary with Aberdeen

If you're Directly Authorised by the FCA and haven't applied for an Agency with abrdn, please tick the box above and **complete the Registration Form**.

Please note: if your Company does not have the necessary FCA permissions to give advice on Investment business, we will not be able to create an agency for you.

Register as an Intermediary with abrdn

If you're a member of a Network, please contact them to request an agency code. If you're a Directly Authorised Intermediary who requires an additional code, tick the box above and **submit your request using the Origo Agency Administration service**. This service is secure, free to use and you can request on behave of multiple Product Providers simultaneously.

For any further help, please contact our team at: Wrap_servicing@aberdeenplc.com or call them on 0345 279 1001.

Part D – Your signatures(s)

Signatures of all policyholders (including assignee(s), trustee(s) where appropriate:

Signature	<input type="text"/>	Name	<input type="text"/>
		Role	<input type="text"/>
		Date (DD/MM/YYYY)	<input type="text"/>
Signature	<input type="text"/>	Name	<input type="text"/>
		Role	<input type="text"/>
		Date (DD/MM/YYYY)	<input type="text"/>
Signature	<input type="text"/>	Name	<input type="text"/>
		Role	<input type="text"/>
		Date (DD/MM/YYYY)	<input type="text"/>
Signature	<input type="text"/>	Name	<input type="text"/>
		Role	<input type="text"/>
		Date (DD/MM/YYYY)	<input type="text"/>

Once this document has been complete, please email Wrap_Servicing@aberdeenplc.com or post to:
Aberdeen Client Servicing
Sunderland
SR43 4EE

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