Power of Attorney Registration Form

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Support available to you

This form has been designed to support you when registering a Power of Attorney to an account. We appreciate that this may be a difficult time for you and want to make the process as smooth as possible.

Please complete the attached form and return it to us by post or using our online document upload facility, along with either the original Power of Attorney or a certified copy. See next steps for details of who can certify it.

The address to send it to is:
Jupiter Unit Trust Managers Limited, PO Box 10666, Chelmsford, CM99 2BG.

Our online document upload facility can be accessed at
www.jupiteram.com/uk/en/individual/power-of-attorneys-and-executors

If you have any questions, please contact us as follows:

- 0800 561 4000 (+44(0)1268 448642 if calling from overseas) between 9am and 5:30pm, Monday to Friday
- via webchat on **www.jupiteram.com** between 9am and 5pm
- via email at **enquiries@jupiteronline.co.uk**

If you want correspondence in another format (for example Braille, large print or audio) or if there are any other service adjustments you would like us to make for you, please let us know.

We recommend you discuss any investment decisions with a financial adviser.
Jupiter is unable to provide investment advice.
If you do not have a financial adviser, you can find one by going to
www.unbiased.co.uk or www.thepfs.org/yourmoney/find-an-adviser/

Next steps

- Complete this form and return it to us, along with either the original Power of Attorney document or a certified* copy, and any other relevant information using the methods shown at the beginning of the document.
- We'll add you to the account and confirm back to you that the account has been updated.
  If we are not able to verify any of the attorneys electronically, we'll write to the relevant attorney(s) and ask for documentary evidence of their identity and address.
- If you want to make any further changes on the account, please contact us and we'll guide you on the next steps.

*Documents can be certified by someone in one of the following professions – solicitor/lawyer, legal executive, bank official, notary public, commissioner for oaths, financial adviser, post office official, stockbroker or accountant. The certification will need to be on the front of every page and the certifier will need to state 'original seen' and then sign, date and print their name, job title, company name, full address and telephone number. The certification must be dated within the last 6 months and the certifier must not be a family member.

We have included below details of resources which you may find useful:

Age UK

- 0800 678 1602
- ageuk.org.uk

Support for older people.

Citizens Advice

- 0800 144 8848
- Citizensadvice.org.uk

Provide free, independent, confidential information and advice.

Court of Protection

- 0300 456 4600
- Courtofprotectionenquiries@justice.gov.uk
- www.gov.uk/courts-tribunals/court-of-protection

A specialist court for all issues relating to people who lack capacity to make specific decisions.

Office of the Public Guardian

- 0300 456 0300
- customerservices@publicguardian.gov.uk

Helps people to stay in control of decisions about their health and finance and make important decisions for others who cannot decide for themselves.

Solicitors for the Elderly (SFE)

- 0844 5676 173
- www.sfe.legal

A national organisation of lawyers who provide legal advice for older people, their families and carers.

1 Client details

Unitholder number		
Title	First name(s)	Surname
Address		
		Postcode

If the client has changed address and you have not yet notified us of this change, please include details of their old address below. If they are living in a care home, we will need a letter from the care home on their headed paper confirming the client is a resident there.

Address	
	Postcode

2 Correspondence details

Please tick one of the boxes below to confirm whether you want correspondence to continue to be sent to the client or whether you want it to be sent to an attorney. Even if you select to have it sent to an attorney, there will be certain correspondence that will still be sent to the client.

☐ Send correspondence to the client

☐ Send correspondence to the attorney

Correspondence will automatically be sent to the first named attorney on the Power of Attorney.
If you want it sent to another attorney, please provide their name below:

3 Type of Power of Attorney

Please tick one of the following to let us know which document you have:

☐ General Power of Attorney

☐ Enduring Power of Attorney

☐ Lasting Power of Attorney

☐ Limited Power of Attorney

☐ Continuing Power of Attorney (Scotland)

Only complete this section if you have selected Lasting Power of Attorney (LPA) and this was granted after 17 July 2020:

Rather than sending in the document, you have the option to give us the access code and we will be able to view it. The code, however, is only valid for 28 days from when the document was granted to the attorney or donor. If more than 28 days have passed since the LPA was granted, we will need to see the actual document.

If you have an access code which is still valid, enter it below:

LPA access code	V												

If there are restrictions/preferences/instructions in place on the LPA please include these in the box below. Sometimes the restrictions/preferences/instructions do not show on the online document and we may still ask you to send the paper document so we can validate these instructions – you can provide the access code and the paper document together if you wish.

4 Capacity

Please tick the relevant box below to confirm whether or not the client you are attorney for still has capacity. You do not need to complete this if you are sending us an Enduring Power of Attorney.

☐ Client still has capacity ☐ Client is incapacitated

5 Anti-money laundering requirements

Under anti-money laundering regulations, we need to verify the identity of both clients and their personal representatives. We will try to do this electronically but if this is unsuccessful, we will need proof of name and permanent residential address. If we are unable to obtain it electronically, we will contact the relevant attorney(s) and ask for documentary evidence of their identity and address.

To allow us to attempt to verify your details electronically, please provide the below information. If there are more than four attorneys, please provide their details on a separate piece of paper.

6 Power of Attorney(s) details

First named Attorney

Title	First name(s)	Surname
Address		
		Postcode
Date of birth	Signature	Date

Second named Attorney

Title	First name(s)	Surname
Address		
		Postcode

Date of birth	Signature	Date

Third named Attorney

Title	First name(s)	Surname
Address		
		Postcode

Date of birth	Signature	Date

Fourth named Attorney

Title	First name(s)	Surname
Address		
		Postcode

Date of birth	Signature	Date

If there are replacement power of attorneys, please provide us with their name(s), address(es), date(s) of birth and signatures(s). This can be provided on a separate sheet of paper.

Please note that if the holding is sold, we are unable to release the proceeds until we have verified all parties on the account. The proceeds will be held in a non-interest bearing account, as per client money rules.

For any help please contact us on **0800 561 4000**
or via webchat at **www.jupiteram.com**

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