

Signatureless bond process form

Client(s) name:

Subject of request:

Name of completed documents attached:

Total number of attachments:

By submitting this application I confirm that:

1. I'm an authorised financial adviser
2. I have all the necessary authority from my client(s) to complete this request and submit it on their behalf
3. I have ensured that my client(s) have had sufficient time to read and understand all of the information they need to make their request, including but not limited to; policy key features document, policy terms and conditions, important policy information, relevant servicing form, this declaration, etc
4. Where applicable, I have agreed with my client(s) the level and frequency of adviser charging and have explained that payment of the adviser charging will be facilitated through the product
5. By submitting my client(s) information to Prudential UK*, I'm confirming that I have permission from my client(s) for Prudential UK to process their data. I have provided my client(s) with your data protection notice, (which can be found at pru.co.uk/mydata) before asking you to process their data so that they understand how and why their personal information is used, who you may share it with and their rights around their personal information in accordance with data protection legislation.
6. The details I have submitted on behalf of my client(s) in this application accurately reflect the details they have given me for this purpose and I certify that in accordance with the Prudential Terms of Business for financial advisers and the provisions of the UK Money Laundering Regulations 2017 and the Guidance Notes for the Financial Sector (as amended from time to time). In order to help with preventing fraud, I have verified the identity of my client(s) for this request and of any other relevant partners to this contract (eg trustees) based on original documents, data or information obtained from a reliable and independent source. I can confirm that I believe the evidence I have obtained to verify the identity of my client(s), including the bank account to be used, is genuine and that I have obtained confirmation from my client(s) that it is genuine
7. I acknowledge that I may be liable for any losses caused to Prudential UK as a result of Prudential UK processing this request where I don't have my client(s) permission to do so or where I have not submitted this request in accordance with my client(s) instruction, eg by providing false or misleading information and/or documents

*Prudential UK means The Prudential Assurance Company Limited, Prudential Distribution Limited, Prudential Lifetime Mortgages Limited, Prudential Pensions Limited and M&G Wealth Advice Limited as appropriate

Adviser name:

This is just for UK advisers – it's not for use with clients.

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