



**OLDMUTUAL**  
WEALTH

**Private & Confidential**

Trustees of The Matlock Ford Pension Scheme  
Pension Practitioner  
48 Chorley New Road  
Bolton  
Lancashire  
BL1 4AP

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[www.oldmutualwealth.co.uk](http://www.oldmutualwealth.co.uk)

**With Compliments**

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Old Mutual Wealth Holdings Limited, Old Mutual Wealth Business Services Limited, Old Mutual Wealth Life Assurance Limited, Old Mutual Wealth Limited and Old Mutual Wealth Life & Pensions Limited. All companies are registered in England & Wales under numbers 1606702, 1579311, 1363932, 1680071 and 4163431 respectively. Registered Office at Old Mutual House, Portland Terrace, Southampton SO14 7EJ, United Kingdom.

Old Mutual Wealth Life Assurance Limited and Old Mutual Wealth Life & Pensions Limited are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Their financial services register numbers are 110462 and 207977 respectively.

Old Mutual Wealth Limited is authorised and regulated by the Financial Conduct Authority with register number 165359.

VAT number for all above companies 386 1301 59.

SK0164/218-0316/March 2018

# COPY



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WEALTH

Trustees of The Matlock Ford Pension Scheme  
Pension Practitioner.com  
Daws House  
33-35 Daws Lane  
London  
NW7 4SD

Dear Sirs,

We have been advised by the bank that the direct debit for your Collective Investment Account was rejected on 10/02/2018, with the response "Accounts Closed".

We have therefore cancelled the direct debit. If you would like to continue to pay into your account, we will need you to complete and send us a new direct debit instruction. I have enclosed a direct debit mandate for you.

If you have any questions about this letter, please contact your financial adviser in the first instance or you can contact us using the details shown.

Yours sincerely

Anthony Scammell  
Head of Customer Experience

**15 February 2018**

**Call us**

Customer Contact Centre  
Freephone: 0808 171 2626

Open Mon – Fri 8.00am to 7.00pm

**Email us**

[ask@omwealth.com](mailto:ask@omwealth.com)

**Write to us**

Old Mutual Wealth  
Old Mutual House  
Portland Terrace  
Southampton  
SO14 7AY

**Visit our website**

[www.oldmutualwealth.co.uk](http://www.oldmutualwealth.co.uk)

**Your details**

Client reference: 2-347214094

Account number: 100350490

**Enclosed with this letter**

- Direct Debit Mandate

**What to do next**

- Let us or your adviser know if you have any questions about this letter

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Old Mutual Wealth provides you with access to its investment platform. Within this platform you can open an ISA and Collective Investment Account provided by Old Mutual Wealth Limited and a Collective Retirement Account and Collective Investment Bond provided by Old Mutual Wealth Life & Pensions Limited.

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**INTERNAL USE ONLY**



# DIRECT DEBIT INSTRUCTION –

## For use with the ISA and Collective Investment Account

**IMPORTANT NOTES:**

- You can use this form to
  - change the bank details for an existing Direct Debit on an ISA or a Collective Investment Account (CIA) with Old Mutual Wealth Limited. If you wish to start paying by Direct Debit, you must complete an application form
  - support an online application for an ISA/CIA where a paper Direct Debit instruction is required
  - restart a Direct Debit on your ISA or CIA.
- If you need to change any other details of an existing Direct Debit arrangement, please complete a **Direct debit amendment for the ISA or Collective Investment Account** form.
- Direct Debit collections will show on your bank statement as Old Mutual Wealth Limited.
- This Direct Debit instruction should be completed in BLOCK CAPITALS with blue or black ink.
- We will insert the 'Reference' on the Direct Debit instruction, please leave this blank.
- The completed form should then be sent to us at the address below. Do not send this form to your bank.

Investor name(s) ▶ include joint holder names or name of company/trust/scheme, if applicable

Please quote your existing client reference number ▶ if known

Application number ▶ if applicable

Please tick the date you would like your monthly Direct Debit investments to be collected from your bank.  
If you tick neither date, we will collect your Direct Debits on the 10th of each month.

 10th 20th

Monthly direct debit investments will CONTINUE INDEFINITELY unless we hear otherwise from you.



**OLD MUTUAL**  
WEALTH

### INSTRUCTION TO YOUR BANK OR BUILDING SOCIETY TO PAY BY DIRECT DEBIT.



**Please complete the form and send to:**

Old Mutual Wealth Limited, Old Mutual House, Portland Terrace,  
Southampton SO14 7AY.

Service user number

6	9	0	6	9	7
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Name and full postal address of bank/building society

To: The Manager
bank/building society
Address
Postcode

Reference

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**Instruction to your bank or building society**

Please pay Old Mutual Wealth Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.

I understand that this Instruction may remain with Old Mutual Wealth Limited and, if so, details will be passed electronically to my bank/building society.

Name(s) of account holder(s)

Signature(s)

  

Date

/	/20
/	/20

Bank/building society account number

--	--	--	--	--	--	--	--	--	--	--	--

Branch sort code

--	--	--	--	--	--	--	--	--

Banks and building societies may not accept Direct Debit Instructions for some types of account.

Reset form

This Guarantee should be detached and retained by the payer.

**The Direct Debit Guarantee.**

- This Guarantee is offered by all banks and building societies that accept Instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Old Mutual Wealth Limited will notify you five working days in advance of your account being debited or as otherwise agreed. If you request Old Mutual Wealth Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Old Mutual Wealth Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Old Mutual Wealth Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



Old Mutual Wealth  
Head Office  
Old Mutual House  
Portland Terrace  
Southampton  
SO14 7AY

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When printed by Old Mutual this item is produced on a mixed grade material, which uses a combination of recycled wood or paper fibre from controlled sources and virgin fibre sourced from well managed, sustainable forests.

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