



Please complete all appropriate sections, print the form out and ensure it is signed by the customer at the bottom of each page.
Please post both sheets to NS&I, Glasgow, G58 1SB

**National Savings
and Investments
Glasgow
G58 1SB**

Customer Name: _____

1st Line of Address: _____

2nd Line of Address: _____

Postcode: _____

NS&I Number (if known): _____

Or NS&I Account Number(s): _____

Dear NS&I,

This letter is to indicate that I authorise **[Name of Financial Advice firm or Solicitor or Accountant]** _____, hereby named as My Advice Firm, to be provided with information held by NS&I about my savings with you. I understand that My Advice Firm may provide details of staff that are not registered on the Financial Conduct Authority register that will be able to obtain information.

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 Advice Firm should be given these details from **[Starting 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 should my relationship with My Advice Firm end.

I am aware My Advice Firm 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.

Currently information can only be obtained by calling the Adviser Helpline on 0800 092 1228, or via post.

Customer Name: _____

Date: _____

Customer Signature: _____

Letter of Authority



nsandi-adviser.com
0800 092 1228

Please complete all appropriate sections, print the form out and ensure it is signed by the customer at the bottom of each page.

Please post both sheets to NS&I, Glasgow, G58 1SB

Complete the table below with details of all individuals that will need to act on the customer's account.

At least one FCA Registered Adviser must be listed on the table.

Advisers/Staff Name	Role within firm	Advisers/Staff Date of Birth	Advice Firms FCA Registered Address (Firm Address)	Advisers/Staff FCA Number (Leave blank for non FCA registered staff).	Advisers/Staff Signature

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.

Customer Signature: _____