# Member Onboarding Template

**Contact Information**

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| **Member Name** |  |
| **TEX Number** |  |
| **Contact Name** |  |
| **Contact Email Address** |  |
| **Contact Phone Number** |  |
| **Postal Address** |  |

**Members Account Details**

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| **Nominee Account name** |  |
| **Identifying BIC** |  |
| **Business Entity BIC (8/11 Code)** |  |
| **SWIFT Distinguishable Name** |  |
| **Bank Details** Sort Code:  Account Number:  Roll Number:  Account Name: |  |
| **Payments sent via Cheque or Electronically?** |  |

**ISA Managers Only**

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| **HMRC Reference Number** |  |

**Pension Only**

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| **PSTR Number** |  |