



# Power of Attorney Notification

## Mandatory fields marked with\*

Both the account holder ("you") and the attorney should complete this form. This form should be read in conjunction with the relevant Lloyds TSB Share Dealing Terms and Conditions. If you have any questions about completing this form, please call Customer Services on **0845 60 60 560**.

**A power of attorney may only be used to open an ISA if the investor is not able to complete the application form by reason of mental disorder or incapacity, or by reason of physical disability, illness or old age.**

## Section A Account holder's details

Title\* Mr  Mrs  Miss  Ms  Other

Surname\*

Forename(s)\*

Address\*

Postcode\*

Lloyds TSB Share Dealing account number\*

## Section B Attorney's details

Title\* Mr  Mrs  Miss  Ms  Other

Surname\*

Forename(s)\*

Date of Birth\*

Address\*

Postcode\*

Daytime phone

Email address

Please specify what correspondence should be sent to this third party:

Contract Notes  Report Packs  Letters

## Section C Notification

You hereby notify Lloyds TSB Bank plc ("LTSB") that the individual whose details appear in Section B ("the Attorney") has been appointed your attorney and has authority to act on your behalf in relation to Lloyds TSB Share Dealing.

The original of the power of attorney (or a copy certified as a true copy in accordance with the Powers of Attorney Act 1971) is enclosed with this form for noting.

### Account number and PIN

The account number will be issued to the Attorney by Lloyds TSB Share Dealing. You are reminded that you are and continue to be responsible for the confidentiality and use of PIN and account numbers.

### Contract notes, statements and payments

Contract notes, statements and other confirmations relating to your Lloyds TSB Share Dealing account will continue to be sent to you in accordance with the relevant Lloyds TSB Share Dealing Terms and Conditions. Copies will be sent to the Attorney, if requested, with the exception of Tax Vouchers. Payments will be made to you.

### Termination

You must notify LTSB as soon as the Attorney's authority comes to an end. If LTSB does not receive notification LTSB may be entitled to continue to deal with the Attorney.

### Agreement of the Attorney

- I confirm I am over 18 years of age and resident in the UK;
- I agree to indemnify LTSB and its associated companies against any losses, costs, liabilities or expenses incurred by us or them arising directly or indirectly from any unauthorised transaction;
- I confirm that the investor is not able to complete the ISA application form and that this is by reason of mental disorder or incapacity, or by reason of physical disability, illness or old age;
- I agree to comply with all applicable laws, rules and regulations in exercising my authority under the Power of Attorney; and
- I agree to be bound by the relevant Lloyds TSB Share Dealing Terms and Conditions.

The Attorney's personal data will be verified and processed by LTSB in accordance with the Terms and Conditions and subject always to the Data Protection Act 1998. If the information relating to the Attorney cannot be verified LTSB will require the Attorney to provide LTSB with additional information in order to verify identity. If LTSB cannot verify the Attorney's identity, the Attorney will not be able to use Lloyds TSB Share Dealing.

### Signature of primary account holder

Signature\*

Date\*

### Signature of Attorney

Signature\*

Date\*

Please return this form in the enclosed pre-paid envelope, or post it to:  
Lloyds TSB Share Dealing, PO Box 4605, Aspect House, Spencer Road, Worthing BN99 6QY.

## Checklist

Please use this checklist to ensure that you have completed the Power of Attorney Notification form in full and enclosed all the supporting documents for your attorney.

### Personal details

Ensure that you have completed all your personal details including your address.

### Attorney details

Ensure that you have completed all the personal details for your attorney including their address, postcode and date of birth.

**NB:** If the attorney has been at their current address for less than 18 months, please also include a statement from their bank account (which is less than 3 months old) **and** one of the following: (a) Current HM Revenue & Customs Tax Notification (less than three months old), **or** (b) Original current signed passport\* **or** (c) Certified copy of a full UK/EEA driving licence\*.

Please note that any original documentation provided will be returned as soon as your application has been processed.

If you do not wish to send original documents in the post (see below for passports), you should send copies certified to be true copies of the originals by a regulated entity authorised and regulated by the Financial Services Authority (e.g. a bank) or a government department. The person undertaking the certification must be capable of being contacted. You cannot certify your own documentation.

\*As we are unable to accept certified copies of passports the original item must be submitted as evidence of identity.