



Tax Adviser/Accountant Letter of Authorisation

By completing and signing this form, you can authorise a nominated Tax Adviser/Accountant to receive and access information on your account via the Davy Tax Pack Portal. The Tax Adviser/Accountant will not be able to give instructions, buy or sell investments, or change any details on your account.

Please complete this section in full

Client account number(s)	<input type="text"/>	<input type="text"/>
Account holder name:	<input type="text"/>	
Joint account holder's name:	<input type="text"/>	
Client address:	<input type="text"/>	

- I/we agree and acknowledge that I/we have consented my/our Tax Adviser/Accountant to access my/our information available on the Davy Tax Pack Portal. I/we agree and acknowledge that Davy will provide new login credentials to my/our Tax Adviser/Accountant acting on my/our behalf for the purpose of the services.
- I/we confirm that I/we have informed my/our Tax Adviser/Accountant about this new Davy Tax Pack Portal and my/our Tax Adviser/Accountant has opted to use this service.
- I/we further agree and acknowledge that, I/we are solely responsible to notify Davy in an event I/we change my/our Tax Adviser/Accountant or if the Tax Adviser/Accountant cease to act on my/our behalf.
- I/we agree and accept all of the above listed terms of the service.

Signature(s)

Account holder		Joint account holder	
Signature	<input type="text"/>	Signature	<input type="text"/>
Date	<input type="text"/>	Date	<input type="text"/>

Tax Adviser/accountant details

Contact 1

Contact name	<input type="text"/>
Firm name	<input type="text"/>
Firm address	<input type="text"/>
Email	<input type="text"/>
Mobile number	<input type="text"/>

We fully respect your right to privacy, and any information (including any personal data) which we obtain and process about you ('Information') will be treated in accordance with our Privacy Notice, our standard principles regarding client confidentiality and applicable data protection legislation. We take your privacy very seriously and our policy is to only collect and process necessary information about you. We shall use the information that you provide to us in this form for the purpose of providing our services to you, including without limitation, servicing any of your accounts and the execution of transactions on your accounts. Full details of how we use and safeguard your personal data are available in your terms and conditions and in The Davy Group Privacy Notice, which can be found on the Davy website.