

Client change of address



Advisers who have read/write permissions on the Aviva Platform will now be able to amend their customers' residential and/or postal address (where applicable). Any address amendments for other non-Platform products will need to be updated separately.

Please be aware the following requests will still need to go to, and be processed by our Platform operations team

- If a Change of Address is required on an interested party associated with the account
- Where the customer is moving to a foreign address
- For Corporate or Trust accounts, or for the Trustees on the account

An address can be amended from the 'Client details' tab on the Review menu from the Portfolio or Account summary page as shown below -

Account	Account number	Latest valuation	£ +/- since 08 February 2021	%		Review
ISA Portfolio ISA 2021/2022 Remaining: £10,053.41 Used: £10,000.00	AV2436672-001	£34,342.69	▼ -£160.25	85.45%	⋮	Transaction history >
Pension Portfolio Pre-Retirement Pre Retirement	AV2436672-002	£5,845.66	▼ -£154.10	14.55%	⋮	Correspondence >
Total		£40,188.35	-£314.35			Client report >
						Charges >
						Corporate actions >
						Client details >
						ESG Profiler >

On the 'Contact details' screen there will now be an 'Edit' option. This will be available for both Residential and Postal address options. They can also add/amend the customers phone number.

Contact details Banking details Pension details

Residential address

Line 1 Aviva UK Central Services	Line 2 St. Helens	Line 3 1 Undershaft	City London
County City of London	Postcode EC3P 3DQ	Country UK	
Line 1 Wellington Row	Line 2	Line 3	City York
County York	Postcode YO90 1WR	Country UK	

Edit

Selecting the 'Add New Address' option will allow the user to key in the new address and they can use the post code look up function to find the address.

Addresses

Residential address

Country

UK

Address

Select an existing address to edit or add a new address.

Select address

Select address
YO90 1WR, Wellington Row, York, York

Add New Address

Start typing address or postcode

Address Holder

Kiran ISA

Line 1

Wellington Row

Line 2

Line 3

City

York

County

York

Postcode

YO90 1WR

Once keyed and the address populated, the 'Update' button **must** be selected at the bottom of the page for the new address to be saved/updated.

Nationality details

Country of nationality

UK

Does your client have dual nationality?

Yes No

Update Cancel

If the customer has interested parties associated with the accounts, for example where there is a Power of Attorney, the address will be displayed on the Contact details tab. Once Edit is selected, only the account owners address will be available to edit.

If the address held on the customer's account has been identified as an address that had returned mail, an indicator will have been placed on the account to prevent further correspondence being issued until a new address is confirmed. A notification will be presented to confirm that updating that address will remove the indicator.

Confirmation of the change will be sent to the customers new address.

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