



Third party application form for unincorporated bodies/societies

COUTTS ONLINE



Coutts

1. Existing Coutts Online client's details

Enter the business name of the existing Coutts Online client together with their address, postcode and country details.

2. Third Party details

Enter the Third Party business name that is allowing the existing Coutts Online client access to their accounts. This business must be a different legal entity to the one named in Section 1.

3. Accounts to be added

Accounts will be added to the administrators of the existing service with full payment capabilities, including confidential rights, or Read Only depending on the box selected.

Select from the available options:

- All accounts of the Third Party named in Section 2 are to be added, including any accounts opened in the future.
- All accounts of the Third Party named in Section 2 are to be added, excluding any accounts opened in the future.
- Only the account(s) detailed – list here the accounts of the Third Party named in Section 2 and only these will be added.

4. Third Party Resolution

Complete the full name of the Members/Management Committee meeting, the organisation name that is allowing the existing Coutts Online client access to their accounts and the date when the resolution was passed. Enter the names of the individuals who were nominated at this meeting to sign Section 7 of this Third Party Application Form. These individuals must already be named on the current bank mandate. Insert the business name of the existing Coutts Online client.

5. Declaration

The signatures entered in this section must be the Chairman of the meeting and the secretary to confirm that the resolution in Section 4 was duly passed and entered in the Minute Book of the Organisation.

7. Agreement (to be signed in accordance with the resolution in Section 4)

Copies of the Online Service Terms are available at coutts.com/onlineterms or from your Banker.

We would draw your attention to clause 1, paragraph C. (Appointment of User(s) and Administrator(s)), which outlines the responsibilities of the administrator and, in particular, their ability to allocate access to the account(s) to other users. The signature(s) required here are those of the individuals that have already been named in Section 4, and who are already on the Third Party's current bank mandate.

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This Third Party Online Application form must be completed by any Third Party who wishes to add their accounts to an existing Coutts Online client's service

How to complete this form

This Third Party Mandate must be completed in BLOCK CAPITALS using black ink. Where marked * delete as appropriate by any Third Party who wishes to add their accounts to an existing Coutts Online client. The Online Service Terms are available online for you to read and print. **These are important, please read them.** Please go to coutts.com/onlineterms or alternatively ask your Banker for a copy. The completed form should be returned to: **Coutts Online Team, Coutts & Co, FREEPOST LON20747, Trinity Quay, Bristol BS2 0FA.**

1. Existing Coutts Online client's details

Business name	
Business address	
Post code	
Country	

2. Third Party details

Business name	
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3. Accounts to be added

The Third Party client accepts the Online Service Terms and instructs the Bank to include all account(s)/all future account(s) or only the account(s) detailed below within the existing client's Coutts Online service. Accounts will be added to all administrators with full transaction capability, including confidential rights, or Read Only depending on the box selected below.

The Third Party acknowledges that administrators may be subject to change and this is under the control of the existing Coutts Online client. For any changes to these preferences, and/or to add future accounts where this preference has not been selected, the client is required to provide the Bank with confirmation in writing.

All accounts including all future accounts opened Read Only ☐ Full access ☐

All accounts excluding all future accounts opened Read Only ☐ Full access ☐

Only the account(s) detailed below:

Account name	
Account number	
	Read only ☐ Full access ☐
Account name	
Account number	
	Read only ☐ Full access ☐

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Account name

Account number

Read only

☐

Full access

☐

Account name

Account number

Read only

☐

Full access

☐

Account name

Account number

Read only

☐

Full access

☐

4. Third Party Resolution

Important note – The individual(s) named in the resolution must also be named in the mandate held by the Bank.

• Certificate

We certify that the resolution below was duly passed and at a meeting of

(eg Members/Management Committee)

of (organisation name)

held on

• Resolution

‘It was resolved that

(Name of individual)

and

(Name of individual)

are authorised to:

- complete and sign the Coutts Online Third Party Application Form for the provision of the Coutts Online service; and
- instruct the Bank to disclose information relating to its accounts to

(the existing Coutts Online Client)

- accept the Online Service Terms, on behalf of the organisation’

5. Declaration

Signed by the Chairman of the Meeting

Signature

Date

Name

Signed by the Secretary

Signature

Date

Name

6. Your information

In the clause above, 'you' and 'your' extends to any individual who has supplied us with personal information in relation to the Account(s).

Any Authorised Persons named below must also be named in the Third Party mandate held by the Bank.

The Coutts Online client has completed a Coutts Online Application Form for the provision of internet banking services by Coutts.

The Online Service Terms allow the Coutts Online user to include a third party's account(s) within their Coutts Online service and to provide instructions (including payment instructions) in relation to the third party's account(s), where this access has been provided.

The Online Service Terms are available online for you to read and print. These are important, please read them. To access these go to coultts.com/onlineterms or alternatively please ask your Banker for a copy.

This Third Party Mandate will continue until the Third Party gives written notice, signed by the Company Secretary, to the Bank cancelling the mandate.

The Third Party makes the following declaration:

We have read and agree the Online Service Terms, a copy of which is available to read and download from the website [coutts.com/online/terms](https://www.coutts.com/online/terms). We note clause 1, paragraph C. (Appointment of User(s) and Administrator(s)), of those Terms which outlines the responsibilities of the administrator and in particular their ability to allocate access to the account(s) to other users and this authority will apply to all future accounts unless we advise you in writing to the contrary.

Signature

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Date _____

D	D	M	M	Y	Y	Y	Y
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Name

[illegible]

Position

[illegible]

Signature

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Date

D	D	M	M	Y	Y	Y	Y
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Name

[illegible]

Position

[illegible]

Contract number

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Initials

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