



Application form for sole traders

COUTTS ONLINE

Coutts

1. Client details

Complete the sole trader name that Coutts Online will operate under together with the address, postcode and country details.

2. Accounts to be added

List the account names and numbers of all the accounts that are to be reported on the Coutts Online service. These accounts must belong to the legal entity as named above, although accounts belonging to a different legal entity (third party accounts) can be added by completing a Third Party Application Form. If you wish to add more accounts then a continuation form can be found on our website coutts.com or requested from your Banker.

3. Coutts Online administrator details

The administration role is essential for the smooth running of Coutts Online. Details for at least one administrator must be completed, but we recommend that you complete the details for more. We strongly recommend that dual administration is selected and that you complete the details for at least three administrators.

Select a username for the administrator; this must be between six and ten characters and include at least one number. Complete the administrator's title, name, email address and phone number.

The audit facility allows the user to search the Coutts Online database for their audit records. If the user should have access to this information then select 'Yes', if not then select 'No'.

Dual administration is strongly recommended as it is a security measure which requires the approval of two administrators for all changes made to users' approval limits or increases to their access rights. Dual administration is set individually for each administrator, so please indicate here whether this administrator can act independently (select No), or together with another administrator (select Yes).

If an administrator has a smartphone, they can use this as their personal security device, known as CouttsID, instead of a card and reader.

Please provide their preferred email address and mobile number if you would like to do this.

Please note: CouttsID will automatically provide access to Coutts Mobile Banking.

5. Declaration and signature(s)

To be signed by the sole trader. 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.

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How to complete this form

If you would like to use the Coutts Online service please complete the form in BLOCK CAPITALS using black ink. 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. Client details

Business name

Business Address line 1

Business Address line 2

Business Address line 3

Post code

Country

2. Accounts to be added

If you wish to add more accounts, please complete a continuation form, which is available on our website coutts.com or from your Banker.

Account name

Account number

Account name

Account number

Account name

Account number

Account name

Account number

Account name

Account number

Access to Coutts Online is free. All transaction charges will be calculated quarterly and charged to the account the payments were made from, unless you have made specific arrangements to the contrary.

3. Coutts Online Administrator details

Please provide the details for at least one administrator. If you select dual administration, which is strongly recommended, for any of your administrators, please provide details for more than one administrator. Please provide a username which will be used to log in to Coutts Online. This must be between six and ten characters and include at least one number.

Administrator 1

Username

Title

First name

Surname

Unique email address

Audit information

Yes ☐ No ☐**Dual administration**

All changes made by an administrator will need to be validated by a second administrator

Yes ☐ No ☐

If an administrator has a smartphone and would like to use this as their personal security device, known as CouttsID, then please provide their preferred mobile number.

If mobile number is not provided, a card and reader will be issued.

Administrator 2

Username

Title

First name

Surname

Unique email address

Audit information

Yes ☐ No ☐**Dual administration**

All changes made by an administrator will need to be validated by a second administrator

Yes ☐ No ☐

If an administrator has a smartphone and would like to use this as their personal security device, known as CouttsID, then please provide their preferred mobile number.

If mobile number is not provided, a card and reader will be issued.

Administrator 3

Username

Title

First name

Surname

Unique email address

Audit information

Yes ☐ No ☐

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Dual administration

All changes made by an administrator will need to be validated by a second administrator

Yes

☐

No

☐

If an administrator has a smartphone and would like to use this as their personal security device, known as CouttsID, then please provide their preferred mobile number.

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If mobile number is not provided, a card and reader will be issued.

4. Your information

We will use your information in accordance with the clause headed 'Your information' which forms part of the Conditions of Use of your existing Coutts Business Current Account agreement with us. If you require a copy of that clause, please contact your Banker.

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

5. Declaration and signature(s)

I have read and agree the Online Service Terms, a copy of which is available to read and download from the website coutts.com/onlineterms. I 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 I advise you in writing to the contrary.

Applicant

Signature

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Date

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Name

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For Coutts Digital Helpdesk use only

Contract number

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Initials

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