



Third party application form for trusts, executors and pension funds (read only)

COUTTS ONLINE



Coutts

1. Existing Coutts Online client's details

The client being given access must already use Coutts Online.

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

2. Third Party (client) details

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

3. Accounts to be added

List each of the account names and numbers belonging to the Third Party named in Section 2, which the existing Coutts Online client is to have access to. These accounts will be added to all Coutts Online users of the existing client as Read Only or, to administrators as applicable.

Please note that any additional Third Party accounts added in the future will require further paperwork.

5. Authority

Where the existing Coutts Online client has an administrator, they will be able to allocate Read Only access to the accounts to other users. We have no control over the number of users who may be granted Read Only access. By signing this form you agree to allowing any user appointed by the administrator to have Read Only access to the account.

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 listed on the Bank mandate, in the case of Trusts, ALL trustees must sign.

COUTTS ONLINE

This Third Party Online Application Form must be completed by any Third Party (Client) who wishes to add their accounts to an existing Coutts Online client's service as read only access

How to complete this form

This Third Party Mandate must be completed in BLOCK CAPITALS using black ink by any Third Party (Client) 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

Name	
Address line 1	
Address line 2	
Address line 3	
Address line 4 OR overseas country	
Post code	

2. Third Party (Client) details

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 the account(s) detailed below within the existing client's Coutts Online service. All accounts will be added to all users as Read Only.

Account name	
Account number	
Account name	
Account number	
Account name	
Account number	
Account name	
Account number	
Account name	
Account number	

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. Authority

The Online Service Terms allow the Coutts Online user to include a third party's accounts within their Coutts Online service. Where the existing Coutts Online client has an administrator, they will be able to allocate Read Only access to the accounts to other users. We have no control over the number of users who may be granted Read Only access. By signing this form you agree to allowing any user appointed by the administrator to have Read Only access to the account.

We have read and agree to the Online Service Terms, a copy of which are available to read and download from the website coutts.com/onlineterms or alternatively, please ask your banker for a copy. 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 Read Only access to the account(s) to other users.

This Third Party Mandate will continue until the Third Party (Client) gives written notice to the Bank cancelling the Mandate.

Signed in accordance with the mandate held by the Bank – In the case of a Trust, ALL trustees must sign.

Signature		Date	
Name			
Position			
Signature		Date	
Name			
Position			
Signature		Date	
Name			
Position			
Signature		Date	
Name			
Position			

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Signature

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Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

[illegible]

Position

[illegible]

Signature

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Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

[illegible]

Position

[illegible]

Signature

--	--

Date _____

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

[illegible]

Position

[illegible]

Signature

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Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

[illegible]

Position

[illegible]

For Coutts Digital Helpdesk use only

Contract number

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Initials

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