



Create/amend administrator

COUTTS ONLINE



Coutts

Guidance notes

This form should be used to create or amend administration and/or audit permissions.

For example:

- to add or remove the administration permission;
- to amend any personal details for an existing administrator;
- to amend the administration rights from dual to unrestricted or vice versa;
- to create a new administrator.

1. Type of administration

Administrator access – An administrator can act alone or with another administrator. 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. To ensure the availability of administrators, we recommend that if dual administrations is set up then at least three administrators should be appointed.

This is set individually for each administrator so please indicate here whether this administrator can act independently (Unrestricted) or together with another administrator (Dual) or if the permission is to be removed altogether (Remove).

Access to Audit information – The audit function 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 'No'.

2. User details

Select a username for the administrator; this must be between six and ten characters long and include at least one number. For an existing user, enter the existing username that is currently used for logging into Coutts Online. Complete the user's title and name. If an administrator has a smartphone, they can use this as their personal security device, instead of a smartcard and reader. If they would like to do this please provide their preferred email and mobile number.

3. Authorisation

The form must be signed in accordance with the current Bank Mandate. We would draw your attention to 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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Please complete all sections of this form in BLOCK CAPITALS using black ink. Where marked * delete as appropriate. Please return to **Coutts Online Team, Coutts & Co, FREEPOST LON20747, Trinity Quay, BRISTOL BS2 0FA**. Should you require further assistance completing this form please contact the Coutts Digital Helpdesk on 0207 770 0000.

The form should be used to create or amend administration and/or audit permissions.

1. Type of administration

We strongly recommend dual administration and to ensure the availability of administrators, we recommend that if dual administration is set up, then at least three administrators should be appointed.

Administrator Access Unrestricted Dual Remove

Access to Audit information Yes No

2. User details

Username

To create an administrator please choose a username here. To amend an existing user, enter their existing username here.

Business name

Title

Mr Mrs Miss Ms Other

If 'Other' please specify

First name

Surname

Phone number

Preferred email address

If the administrator has a smartphone and would like to use this as their security device, then please provide:

Preferred mobile number

3. Authorisation

I/We* confirm that the parties signing this request are on the current mandate held by the Bank. I/We* have read and agree to the Online Service Terms, in particular, we would draw your attention to paragraph C. Appointment of User(s) and Administrator(s), which outlines the responsibilities of the administrator and, their ability to allocate access to the account(s) to other users. The Online Service Terms are available for you to read and print. **These are important, please read them.** To access these go to coutts.com/onlineterms or alternatively please ask your Banker for a copy.

Signature Date

Name

Position held

Signature Date

Name

Position held

If you would like this document in another format such as Braille, large print or audio, please let us know.