



Third party application form for sole traders  
reporting into a private client's service

# COUTTS ONLINE

*Coutts*

### 1. Existing Coutts Online private client's details

The private client being given access must already use Coutts Online.

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

### 2. Third Party details

Enter the Third Party sole trader business name that is allowing the existing Coutts Online private client access to their accounts.

### 3. Accounts to be added

Accounts will be added to the existing client. These accounts will be added with full payment capabilities or as 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.

### 5. Declaration and signature(s)

To be signed by the sole trader. Copies of the Online Service Terms are available at [coutts.com/onlineterms](http://coutts.com/onlineterms) or from your Banker.

Third party application form for sole traders reporting into a private client's service

COUTTS ONLINE

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

**How to complete this form**

This Third Party Mandate must be completed in BLOCK CAPITALS using black ink by any Third Party who wishes to add their accounts to an existing Coutts Online private 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](http://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.**

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

**1. Existing Coutts Online private client's details**

Name

Address

Post code

Country

**2. Third Party details**

Sole trader business name

**3. Accounts to be added**

The Third Party 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 private client's Coutts Online service. Accounts will be added with full transactional capability to the existing Coutts Online user, or Read Only depending on the box selected below.

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	<input style="width: 100%;" type="text"/>		
Account number	<input style="width: 80%;" type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>
Account name	<input style="width: 100%;" type="text"/>		
Account number	<input style="width: 80%;" type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>
Account name	<input style="width: 100%;" type="text"/>		
Account number	<input style="width: 80%;" type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>
Account name	<input style="width: 100%;" type="text"/>		
Account number	<input style="width: 80%;" type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>

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Account name

Account number  Read Only  Full Access

**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)**

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 [coutts.com/onlineterms](http://coutts.com/onlineterms) or alternatively please ask your Banker for a copy.

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](http://coutts.com/onlineterms). This authority will apply to all future accounts unless I advise you in writing to the contrary and instruct and authorise you to grant online access to the above account(s) to the existing Coutts Online private client detailed on this form.

The Third Party Mandate will continue until the Third Party gives written notice to the Bank cancelling the mandate.

Signature  Date

Name

**For Coutts Digital Helpdesk use only**

Contract number  Initials