Guide to Completing your Additional Party Form

GENERAL GUIDANCE

Please complete the additional party form in black ink. If any mistakes are made please initial the correction. If you do not initial amendments to the application form it will be returned for you to initial.

PLEASE READ ALL SECTIONS OF THE ADDITIONAL PARTY FORM. GUIDANCE OF HOW TO COMPLETE THE FORM IS BELOW

At the top of the first page there is a question relating to whether this is an amendment to an existing account. You should check the “Yes” box.

1. ORGANISATION DETAILS
   STEP 1
   Page 1 – Write your organisation name in the appropriate box, ensuring that this matches how the name is represented on the mandate enclosed mandate, and bank statements.
   STEP 2
   Page 1 – You should enter the organisations existing sort code and account number into the boxes provided.

2. ADDITIONAL PARTY PERSONAL DETAILS
   STEP 1
   Pages 1 – Depending on whether you are an existing personal account holder or not, complete the section 2 questions on page 1.
   STEP 2
   Pages 2 – Both the “Other Information” and “Tax Residencies” should be completed.
   STEP 3
   Pages 3 – This page should be completed fully. The position within the organisation should match the mandate and minutes of the meeting (if applicable)

3. OUR AGREEMENT FOR YOUR ACCOUNT
   STEP 1
   Pages 4 – You should read the “Keeping you informed” statement and decide whether you would like to opt out of us keeping you informed.
   STEP 2
   Pages 4 – You should print your full name, date the page, and sign within the box provided.

All new parties to the account will be required to (unless informed otherwise) provide identification at a branch.