

*Westpac use only*

Date \_\_\_\_\_ Authority no.

Tick if schedule attached

**A: Account details**

*This tells us the account number and suffixes you would like to make changes to.*

Account number

**Suffixes** – either  
 (1)  tick here for all suffixes under this base number OR  
 (2) specific suffixes

*This tells us who owns the account (new name).*

First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
 First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
 Full name – company/organisation/club/society/group \_\_\_\_\_  
 Trading name (if different from above) \_\_\_\_\_

*This tells us the old name of the account.*

If this is a change of account name please:  
 1. note your old name below; 2. tick the 'full replacement' option (section B); 3. supply a copy of marriage certificate/deed poll

First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
 First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
 Previous full name – company/organisation/club/society/group \_\_\_\_\_  
 Previous trading name (if different from above) \_\_\_\_\_

**B: Tell us what you want to do**

*Please tick at least one box.*

**Full replacement** – you are either (1) cancelling all existing instructions on the above accounts, and replacing them with the following instructions OR (2) changing name OR (3) changing signing rule.  
 OR  **Add a signatory** – this means you're adding the people below to your existing authority.  
 AND / OR  **Remove a signatory** – please turn over and complete the reverse side.

**C: Authorised people**

*This tells us the people that own the above account(s) and/or who are authorised signatories.*

*If you have more than two authorised people, ask for a schedule that has room for more.*

*\* personal account holders must provide this information*

*\*\* this is for the Government's Resident Withholding Tax (RWT) calculation. If you don't tick anything, we will use the higher tax rate.*

*† If you are using a NZ driver's licence, please also supply the card version number. If you are using a passport, please supply the country of issue.*

First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
 Designation (eg director, trustee, chairperson, treasurer, partner, sole trader, etc) \_\_\_\_\_  
 Phone number: daytime 0- \_\_\_\_\_ home 0- \_\_\_\_\_ Fax 0- \_\_\_\_\_  
 Mobile \_\_\_\_\_ Email \_\_\_\_\_  
 ID type \_\_\_\_\_ ID no.† \_\_\_\_\_ Expiry \_\_\_\_\_  
 ID type \_\_\_\_\_ ID no.† \_\_\_\_\_ Expiry \_\_\_\_\_  
 Home address NUMBER & STREET \_\_\_\_\_  
 SUBURB \_\_\_\_\_ TOWN/CITY \_\_\_\_\_  
 \*Postal address (if different from above) NUMBER & STREET/BOX NUMBER \_\_\_\_\_  
 SUBURB \_\_\_\_\_ TOWN/CITY \_\_\_\_\_  
 \*Date of birth DAY / MONTH / YEAR \_\_\_\_\_ \*Occupation \_\_\_\_\_  
 \*IRD number \_\_\_\_\_ \*\*Tax rate (Tick one circle)  10.5%  17.5%  30%  33%  
 Signature \_\_\_\_\_ Date DAY / MONTH / YEAR \_\_\_\_\_

*By signing you are bound by the conditions on the reverse and Westpac's general terms and conditions.*

First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
 Designation (eg director, trustee, chairperson, treasurer, partner, sole trader, etc) \_\_\_\_\_  
 Phone number: daytime 0- \_\_\_\_\_ home 0- \_\_\_\_\_ Fax 0- \_\_\_\_\_  
 Mobile \_\_\_\_\_ Email \_\_\_\_\_  
 ID type \_\_\_\_\_ ID no.† \_\_\_\_\_ Expiry \_\_\_\_\_  
 ID type \_\_\_\_\_ ID no.† \_\_\_\_\_ Expiry \_\_\_\_\_  
 Home address NUMBER & STREET \_\_\_\_\_  
 SUBURB \_\_\_\_\_ TOWN/CITY \_\_\_\_\_  
 \*Postal address (if different from above) NUMBER & STREET/BOX NUMBER \_\_\_\_\_  
 SUBURB \_\_\_\_\_ TOWN/CITY \_\_\_\_\_  
 \*Date of birth DAY / MONTH / YEAR \_\_\_\_\_ \*IRD number \_\_\_\_\_  
 \*Occupation \_\_\_\_\_ \*\*Tax rate (Tick one circle)  10.5%  17.5%  30%  33%  
 Signature \_\_\_\_\_ Date DAY / MONTH / YEAR \_\_\_\_\_

*By signing you are bound by the conditions on the reverse and Westpac's general terms and conditions.*

**D: Rules**

*This tells us how people can operate the above accounts*

**Please tick just ONE box. If you don't tick anything, we'll assume that anyone can sign by themselves.**

anyone can sign by themselves OR  at least \_\_\_\_\_ must sign together OR  all signatories must sign together

Who needs to complete the following sections?

- only those people authorised on the old authority we have
- new people are not required to sign below

## E: Removing signatories

You're removing these people from your existing authority.

\*eg account owner; signatory; director; trustee; chairperson; treasurer; partner and sole trader etc.

Who needs to sign? Anyone being removed

Full name	Designation*
Signature	Date DAY / MONTH / YEAR

Full name	Designation*
Signature	Date DAY / MONTH / YEAR

Full name	Designation*
Signature	Date DAY / MONTH / YEAR

## F: Authorising changes

**Important** – you cannot sign here if you are being removed.

\*eg account owner; signatory; director; trustee; chairperson; treasurer; partner and sole trader etc.

- 1 For **limited companies or trusts**:
  - all directors or trustees who have not signed in sections C or E must sign below
  - directors or trustees being removed must sign in section E.

- 2 For all **other organisations** (except limited companies or trusts)

**If you have selected this option:**

- full replacement
- add signatories
- anything else

**Then this is who must sign below:**

You do not need to sign anything below

- old account owners/signatories
- you must follow the old signing rule
- old account owners/signatories who are not being removed
- you must follow the old signing rule.

Full name	Designation*
Signature	Date DAY / MONTH / YEAR

Full name	Designation*
Signature	Date DAY / MONTH / YEAR

### Witnessed by

Only complete this section if you are a limited company, and there is only one director.

Full name	Occupation & address (eg. Doctor, Hastings)
Signature	Date DAY / MONTH / YEAR

## G: Declaration

I/We

- agree to be bound by the terms and conditions set out in this application in addition to any other conditions which may apply
- acknowledge having been provided with the Westpac General Terms and Conditions brochure and agree to be bound by the terms set out in the brochure as amended or replaced from time to time
- agree to read the General Terms and Conditions brochure as it contains important statements about our rights and obligations.
- certify that all information supplied in this application is true, correct and complete in every respect and understand that if it is not true, correct and complete, this application may be declined and/or I/we may be liable to Westpac.

**What you have authorised. You authorise:**

- the signatories named in this authority to operate this account(s) and do everything relating to your relationship with Westpac for this account(s) (this is called the banker/customer relationship, and as provided in our "general terms and conditions")
- other people to be added to or removed from this authority

- this authority to apply to the accounts overpage – subject to your signing rule – and nobody can delegate the authority you have given them.

### Receiving and acting on instructions by fax, phone or other means

As part of doing business, Westpac may accept telephone, facsimile, or other instructions in the course of the banker/customer relationship. However, Westpac:

- is not obliged to accept them
- will not be liable to you or any other party if the instructions are unauthorised, forged or fraudulently given and Westpac could not reasonably have detected that from the instructions received.

### Indemnify Westpac

To the maximum extent permitted by law you will indemnify Westpac for its losses in acting on such instructions.

### Adding or removing people to/from the authority

Additional authorised persons may be appointed and any authorised person may be removed only by notice in writing to Westpac signed in the same manner as this form.

### Westpac use only

Receiving branch no.	_____
Branch staff salary no.	_____
Support centre salary no.	_____
Date	_____

Please check:

- CRS updated
- Signatories loaded
- Authority number recorded
- Termet updated
- Cheque/deposit book charged