



Business Online User Form

This form is used to add a new Administrator/Authoriser to Business Online or change the access rights of an existing Business Online user. To make changes to accounts accessed via your Business Online arrangement, please use the 'Business Online – Making Changes Form'.

1. Your details

Business Online ID

Name of Company/Organisation _____

Contact name FIRST _____ LAST _____

Daytime phone number _____

Mobile number _____ Email _____

2. Removing or downgrading existing user access

Given name(s) FIRST _____ LAST _____

Choose **one** of the below access options

Downgrade to Authoriser Downgrade to Creator/Viewer Remove from all user access

Please go to section five - Declaration and Authority.

3. Nominating a new Administrator/authoriser or upgrading existing user access

Mr Mrs Miss Ms Other (please specify) _____ Date of birth DD / MM / YYYY

Name FIRST _____ MIDDLE _____ LAST _____

Phone number(s) _____ Mobile _____

Email _____

Relationship to Organisation _____

What is the new Business Online User role for the individual nominated in this section?

Administrator (or) Authoriser

(Note: Please see the last page for details about the different Business Online User roles, their authority levels and access rights). Westpac is, or may be, required to verify your identity and certain other information provided in this form.

Tick here if the nominated Administrator or Authoriser nominated in section three is already a signatory of an account of the organisation or a signatory of a personal account with Westpac and Westpac already holds their identification details*. No further action required. Please sign below and go to section five.

Tick here if the nominated Administrator or Authoriser nominated is not a signatory of a Westpac account (either an account of the organisation or a personal account).
They must complete section four and then take acceptable identification* and hand this form in person to your Relationship Manager or a Westpac branch. Exception: If the new Administrator/Authoriser is unable to meet with your Relationship Manager or go into a Westpac branch for any reason, they can get a copy of their acceptable ID certified by a Trusted Referee* and submit the certified copy with this form to your Relationship Manager or a Westpac branch.

_____ Date DD / MM / YYYY

Signature of the new Administrator/Authoriser nominated above

4. Identifying the nominated administrator/authoriser

Only to be completed by the nominated Administrator/Authoriser. You only need to complete this section if you are not a signatory of a Westpac account (either an account of the organisation or a personal account).

All fields must be completed.

Occupation/Designation _____

Physical address (including country) _____ CANNOT BE A PO BOX NO _____

Full postal address (if different from above) _____

5. Declaration and authority

I/we

- instruct Westpac New Zealand Limited (“Westpac”) to make the changes set out in this form to my/our Business Online facility and confirm that I/we are bound by the General Terms and Conditions and any other applicable terms and conditions Westpac tells me about (all Westpac terms and conditions are available at westpac.co.nz or at any Westpac branch).
- certify that all information provided in this form 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.
- certify that the person(s) signing below has the authority to sign this form on my/our behalf.
- understand that by completing this form I/we will be providing personal information which will be held securely by Westpac and/or any entity within the Westpac group, and that all information provided by me/us now or in the future will be held and dealt with in accordance with the Westpac Privacy Policy available at westpac.co.nz/privacy.
- declare that all individuals named in this form have by signing this form consented to the disclosure of their personal information to Westpac and use of that personal information in accordance with the General Terms and Conditions.
- authorise any additional Administrators and Authorisers named in this form to operate Business Online subject to the administration and authorisation rules selected by me/us.
- authorise any Administrator nominated in Section 3 of this form to make International Payments via Business Online and register other Business Online Authorisers to also make International Payments by registering their mobile phone numbers in Business Online. International payments are facilitated by Westpac Banking Corporation (NZ branch) ABN 33007457141, incorporated in Australia.
- declare that I/we have obtained the consent of any Administrator listed above to receive text messages and calls from Westpac on the registered mobile phone number given above in relation to my/our Business Online facility.
- understand that, pursuant to the General Terms and Conditions, my/our appointment of Authorised Persons is solely at my/our own risk and that I/we are solely responsible for any use or misuse of Business Online by Authorised Persons, and for ensuring that Authorised Persons are aware of, and comply with, all relevant terms and conditions.

This section must be signed by two Account Owners. **Note:** This form must be signed by the correct people or it will be returned.

Please select one of the following options and sign accordingly:

- Multi Director Companies – Two Directors must sign
- Sole Director Companies – Sole Director must sign
- Trusts or Partnerships – Two Trustees or Partners must sign
- NPOs and Schools – Two Appointed/Elected Officials must sign
- Other - Two Account Owners must sign (unless accounts have only one owner)

Note: Account Signatories may not be Account Owners, unless they have one of the roles listed above.

Name _____ Designation _____

Signature* _____ Date DD / MM / YYYY _____

Name _____ Designation _____

Signature* _____ Date DD / MM / YYYY _____

6. Returning the form

Please see Page 3 for instructions on returning this form.

Westpac use only

Form checklist (to be completed by staff member receiving this form):

Tick

1. Ensure section five signatories are Account Owners e.g. Directors, Partners, Trustees etc
2. If the individual already has a CRS #, you need to:
 - Verify identification held is current and acceptable
 - Load them as a Related Party Online user or BOL user to the organisation in section one

OR

If the individual does not already have a CRS #, you need to:

- Verify and copy acceptable identification document
 - Load them as a Related Party Online user or BOL user to the organisation in section one
3. Form checked for completeness

CRS number of the individual (nominated in section three)

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Completed by

Staff number _____ Date DD / MM / YYYY

Signature _____

Scan and email the checked form to the Business Online Helpdesk. Branch staff must use the Business Online Branch template.

Returning this form

- If a Business Online User has been downgraded or removed or if the nominated Administrator/Authoriser is already a signatory of a Westpac account, you can scan and email the completed form to Business_Online_Helpdesk@westpac.co.nz or hand form in person to a Westpac Branch or your Relationship Manager
- If the nominated Administrator/Authoriser is not a signatory of a Westpac account, the individual MUST take acceptable identification* and hand the form in person to your Relationship Manager or a Westpac branch. Exception: If the nominated individual is unable to meet with your Relationship Manager or go into a Westpac branch for any reason, they can get a copy of their acceptable ID certified by a Trusted Referee* and submit the certified copy with this form to your Relationship Manager or a Westpac branch
- If the nominated individual does not have any acceptable New Zealand identification, talk to your Relationship Manager or a Westpac branch about other options.

*More details about acceptable identification and Trusted Referees is available at westpac.co.nz/AML

Business Online User Roles definition

The three Business Online user roles are described below in their authority levels:

Administrators

These users have the highest level of access to all accounts and functions. They will manage the Business Online access of the other users e.g. Issue/reset passwords, limit user access to particular accounts and functions and register mobile phone numbers of other users.

Authorisers

These users can authorise transactions through Business Online based on your Business Online authorisation rule. All Administrators are automatically Authorisers as well.

Creator/Viewers

These users can only create or view transactions but not authorise them. The users are created and managed by the Administrators once your Business Online is established.

Important: All new authorisers, by default, have full access to accounts and transactions. If necessary, an Administrator can remove their access to specific accounts and functions.

Westpac New Zealand Limited.