



**B. Rules**

This tells us how signatories can operate **all** the accounts opened on the above Base Number.

Please tick just **ONE** circle.

- any one to sign by themselves
- any two to sign together
- any three to sign together
- or
- all signatories must sign together

**Note:** These rules do not apply to your use of our online platforms. Those rules will need to be updated separately.

**C. Signatories**

This tells us who are the account holders and who are the signatories.

If you have more than four signatories, ask for a schedule that has room for more people.

† If you are using a New Zealand Driver's Licence, please also supply the card version number. If you are using a passport, please supply the country of issue.

\* These details are optional

**Signatory 1**  Mr  Mrs  Miss  Ms  Other (please specify) Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Relationship to customer Email

Phone Number HOME MOBILE

ID type ID no.† Expiry DD / MM / YYYY

ID type ID no.† Expiry DD / MM / YYYY

Home address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

\*Postal address (if different from above) NUMBER & STREET/BOX NUMBER

SUBURB TOWN/CITY

Occupation Signature Date DD / MM / YYYY

By signing you are declaring and agreeing to the statements at **Section E**.

We may be required to verify the identity of the people listed and other information provided in this form. Please refer to Westpac's list of acceptable verification documentation available at [westpac.co.nz/AML](http://westpac.co.nz/AML)

**Signatory 2**  Mr  Mrs  Miss  Ms  Other (please specify) Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Relationship to customer Email

Phone Number HOME MOBILE

ID type ID no.† Expiry DD / MM / YYYY

ID type ID no.† Expiry DD / MM / YYYY

Home address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

\*Postal address (if different from above) NUMBER & STREET/BOX NUMBER

SUBURB TOWN/CITY

Occupation Signature Date DD / MM / YYYY

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**Signatory 3**  Mr  Mrs  Miss  Ms  Other (please specify) Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Relationship to customer Email

Phone Number HOME MOBILE

ID type ID no.† Expiry DD / MM / YYYY

ID type ID no.† Expiry DD / MM / YYYY

Home address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

\*Postal address (if different from above) NUMBER & STREET/BOX NUMBER

SUBURB TOWN/CITY

Occupation Signature Date DD / MM / YYYY

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**Signatory 4**  Mr  Mrs  Miss  Ms  Other (please specify) Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Relationship to customer Email

Phone Number HOME MOBILE

ID type ID no.<sup>†</sup> Expiry DD / MM / YYYY

ID type ID no.<sup>†</sup> Expiry DD / MM / YYYY

Home address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

\*Postal address (if different from above) NUMBER & STREET/BOX NUMBER

SUBURB TOWN/CITY

Occupation Signature Date DD / MM / YYYY

By signing you are declaring and agreeing to the statements at **Section E**.

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#### D. Authority

By signing you are declaring and agreeing to the statements at Section E.

Who needs to sign? If signed by a company this document should be signed by a minimum of two directors or by the sole director. In all other cases this form must be signed by all trustees, partners, officers etc. as applicable. If the relevant person has signed at **Section C** they do not need to sign again here.

Full name Designation (eg. director, trustee)

Signature Date DD / MM / YYYY

Full name Designation (eg. director, trustee)

Signature Date DD / MM / YYYY

Full name Designation (eg. director, trustee)

Signature Date DD / MM / YYYY

#### E. Declaration

**Guidance:** For the purposes of this form, the Account Holder is the person(s) authorised to act on behalf of the Account Holder organisation, including for the purposes of opening accounts and appointing signatories for an account, and are normally one of the following:

- A director of a Company;
- A partner in a Partnership;
- A trustee of a Trust; or
- An appointed/elected officer of a Society (Chairperson, Secretary or Treasurer)

A Signatory is authorised by the Account Holder to operate the specific account(s) in accordance with the signing rule (e.g. make payments and view transaction). An Account Holder may or may not choose to be a Signatory.

**You certify** that all information supplied in this form is true, correct and complete. Westpac is committed to your privacy and has a Privacy Policy which explains how Westpac collects, stores, protects and uses personal information.

**You confirm** that you have the authority to sign this form on behalf of the Account Holder organisation and the beneficial owners, and that you are authorised to provide the personal information (including in respect of the beneficial owners) included in this form.

**You agree:**

- this Authority will apply to all accounts opened now or in the future on the Base Number specified at the top of this form ("Accounts");
- only the Account Holder organisation can change this Authority, Signatories cannot do so. Changes can only be made by notice to Westpac in writing. No Signatory can delegate the authority given to them;

- Westpac may accept instructions from any one Account Holder in respect of all matters relating to the Accounts, including to open a new account on the Base Number specified on this form;
- to notify Westpac of a change in details (including name, registered office, telephone, mobile or facsimile numbers and email address) and changes in circumstances, including those affecting account ownership and changes relating to the tax residency information provided; and
- to be bound by the terms and conditions in this form, the Westpac General Terms and Conditions and terms and conditions relating to specific products and services provided to you by Westpac or any of its related companies (the "Westpac Group").

A copy of the Westpac General Terms and Conditions, specific product and service terms and conditions and the Westpac Privacy Policy is available at any Westpac branch or online at [westpac.co.nz](http://westpac.co.nz).

**You authorise:**

- The Signatories to operate the Accounts in accordance with the signing Rules specified at Section B and in the nature of a banker/customer relationship as provided in the Westpac General Terms and Conditions. This extends to accessing and transacting on the Accounts – it does not extend, unless they are also Account Holders, to opening other accounts, applying for certain additional products (such as loan or overdraft facilities), or agreeing to changes to certain existing products relating to the Accounts; and
- Westpac to send you electronic messages about Westpac's, and selected third parties, special offers, rewards programmes, products and services, corporate news and request for feedback. Your consent to such electronic messages is contained in the Westpac Privacy Policy.

#### Westpac use only

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

Date Authority no.