



Third party application form for sole traders

COUTTS ONLINE

Coutts

1. Existing Coutts Online client's details

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

2. Third Party details

Enter the Third Party business name that is allowing the existing Coutts Online client access to their accounts. This business must be a different legal entity to the one named in Section 1.

3. Accounts to be added

Accounts will be added to the administrators of the existing service with full payment capabilities, including confidential rights, or 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 or from your Banker. We would draw your attention to clause 1, paragraph C. (Appointment of User(s) and Administrator(s)), which outlines the responsibilities of the administrator and, in particular, their ability to allocate access to the account(s) to other users.

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

How to complete this form

This Third Party Mandate must be completed in BLOCK CAPITALS using black ink and where marked * delete as appropriate by any Third Party who wishes to add their accounts to an existing Coutts Online 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 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.**

1. Existing Coutts Online client's details

Name

Address

Post code

Country

2. Third Party details

Sole Trader business name

3. Accounts to be added

The Third Party client 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 client's Coutts Online service. Accounts will be added to all administrators with full transaction capability, **including confidential rights**, or Read Only depending on the box selected below.

The Third Party acknowledges that administrators may be subject to change and this is under the control of the existing Coutts Online client. 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

Account number Read Only Full Access

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Account name	<input type="text"/>		
Account number	<input type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>
Account name	<input type="text"/>		
Account number	<input type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>
Account name	<input type="text"/>		
Account number	<input type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>
Account name	<input type="text"/>		
Account number	<input type="text"/>	Read Only <input type="checkbox"/>	Full Access <input type="checkbox"/>

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)

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 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. I note clause 1, paragraph C. (Appointment of User(s) and Administrator(s)), of those Terms which outlines the responsibilities of the administrator and in particular their ability to allocate access to the account(s) to other users and this authority will apply to all future accounts unless I advise you in writing to the contrary.

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

Applicant

Signature	<input type="text"/>	Date	<input type="text" value="D D M M Y Y Y Y"/>
Name	<input type="text"/>		

For Coutts Digital Helpdesk use only	
Contract number	<input type="text"/> Initials <input type="text"/>