



Application form for trusts, executors and pension funds

COUTTS ONLINE

Coutts

1. Client details

Complete the name of the legal entity applying for Coutts Online together with the address, postcode and country details.

2. Accounts to be added

List the account names and numbers of all the accounts that are to be reported on Coutts Online. These accounts must belong to the legal entity as named above.

Select the Read Only box if no payments are to be made from the account.

Accounts belonging to a different legal entity (third party accounts) can be added by completing the Third Party Application Form.

If you wish to add more accounts then a Continuation Form can be found on our website coutts.com or requested from your Banker.

3. Coutts Online user details

Details for at least one user must be completed. Select a username which must be between six and ten characters and include at least one number. Complete the user's title and name. A separate User Permission Request Form quoting these details must be completed for each user.

5. Agreement

The signature(s) required here are those listed on the bank mandate, in the case of Trusts, ALL trustees must sign. Copies of the Online Service Terms are available at coutts.com/onlineterms or from your Banker.

Once signed, this application form together with the User Permission Request Form(s) should be returned to your Banker.

COUTTS ONLINE

How to complete this form

If you would like to use Coutts Online please complete the form in BLOCK CAPITALS using black ink. Where marked * delete as appropriate. 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 your Banker.

1. Client details

Name

Address line 1

Address line 2

Address line 3

Post code

Country

2. Accounts to be added

If you wish to add more accounts, please complete a Continuation Form, available on our website coutts.com or from your Banker. ALL accounts will be added to all users as detailed in their User Permission Request Form.

Account name

Account number

Read only

Account name

Account number

Read only

Account name

Account number

Read only

Account name

Account number

Read only

Account name

Account number

Read only

Access to Coutts Online is free. All transaction charges will be calculated quarterly and charged to the account the payments were made from, unless you have made specific arrangements to the contrary.

3. Coutts Online user details

Please provide the details for at least one user. Please provide a username which will be used to log in to Coutts Online and complete a User Permission Request Form for each user quoting this username. This must be between six and ten characters and include at least one number.

User 1

Username

Title

First name

Surname

User 2

Username

Title

First name

Surname

User 3

Username

Title

First name

Surname

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. Agreement

I/We* have read and agree the Online Service Terms, a copy of which is available to read and download from the website coutts.com/online/terms. This authority will apply to all future accounts unless I/we* advise you in writing to the contrary.

By signing:

- I/We* confirm the details provided are correct and agree to notify the Bank of any changes.
- I/We* agree to the Online Service Terms.
- I/We* confirm the Coutts Online user(s) has agreed you may provide their details to the Bank and to their details being used to provide the Coutts Online service.

Client signature(s) In the case of a Trust, ALL trustees must sign.

Signature

Date

Name

Position

Application form for trusts, executors and pension funds

Signature

--	--

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

[illegible]

Position

[illegible]

For internal use only

Banker Authorisation

I confirm that the users specified on this form can have full access to the accounts specified as per the trust deed.

Banker name

[illegible]

Banker signature

--

Date _____

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

UK Operations checklist

Included

Number of forms

Continuation Form

☒

--	--

User Permission Request Form

☒

--	--

Third Party Accounts Form

☒

--	--

Check form is listed on Sharepoint

☒