



Application form for private clients

# COUTTS ONLINE

*Coutts*

### 1. Client details

Complete your full name; this is the name that Coutts Online will operate under together with your main account number.

You will be registered for online banking with **full access** to the service unless you select the Read Only box.

Full access to the service includes the ability to view your balance and transaction information, as well as the option to make payments and transfers.

Read only access still allows you to view your balance and transaction information and use most of the functionality Coutts Online has to offer, such as alerts and messaging, but will not allow you to make any payments or transfers.

### 2. Accessing Coutts Online securely

Coutts Online is designed to be used in conjunction with our mobile app on a smartphone running a recent version of IOS or Android. For your own security, whenever you undertake certain actions such as logging into the service or making a payment, you would authorise these with a single tap of our mobile app.

We may need to call you if the email address or mobile number provided in this form differ from those held in our records.

### 3. Username

Select a username that you will use to log into Coutts Online. This must be between six and 20 characters and include at least one number.

### 4. Mobile device

You can locate the model name by checking the settings menu on your phone, or looking at the original device packaging.

Please take care to record the full model name. For example (Manufacturer > Model):

Apple > iPhone 13 Pro

Samsung > Galaxy S22 Ultra

### 5. Declaration and signature(s)

Sign and date the form as the applicant for Coutts Online.

For joint accounts, where either party can sign independently on the Bank Mandate only one signature is required on this application. Where the Bank Mandate stipulates both parties must sign all instructions, then both signatories must sign this application and a **read only** version of the service will be provided.

# COUTTS ONLINE

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## How to complete this form

If you would like to use the Coutts Online service please complete the form in BLOCK CAPITALS using black ink. **If you would like this document in another format such as Braille, large print or audio, please let us know.** 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 [www.coutts.com/onlineterms](http://www.coutts.com/onlineterms) 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.**

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## How we will use your information

For full details about how we use the personal and financial information of our clients, please see our full privacy notice at [coutts.com/privacynotice](http://coutts.com/privacynotice).

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### 1. Client details

Full name

All accounts will be added with full transaction capability unless Read only is selected.

Main account number

Read only

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### 2. Accessing Coutts Online securely

Preferred Email address

Preferred Mobile Number

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### 3. Username

Please provide a username which you will use to log into Coutts Online. This must be between six and 20 characters and include at least one number.

User name

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### 4. Mobile device

Please share the detail of the mobile phone that you plan to use in conjunction with the digital service.

Manufacturer

Model

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### 5. Declaration and signature(s)

Please ensure that all signatories to any joint accounts that you would like to view online have signed this form. A separate form will be required for each person who requires Coutts Online access.

I/We\* have read and agree to the Online Service Terms, a copy of which is available to read and download from the website [coutts.com/onlineterms](http://coutts.com/onlineterms), and would like access to all my sole and our joint accounts, credit cards and investment accounts via the Coutts Online service. This authority will apply to all future accounts unless I/We\* advise you in writing to the contrary.

#### Applicant

Signature

Date

Name

#### Joint account holder (if applicable)

Signature

Date

Name

# Application form for private clients

**For Coutts Digital Helpdesk use only**

Contract number

Initials