

# Account signatory changes - non-personal account



This advice supersedes any previous arrangement which means that any person who is an existing signatory who is not listed on this form will be deleted. Use this form to add, delete & retain signatories.

Member number \_\_\_\_\_ Entity name \_\_\_\_\_

I/we wish to vary the signing arrangements on the following account(s) \_\_\_\_\_

**Method of operation - select requirement for transacting:**     any to sign     any two to sign     all to sign

## Details of new signatories to be ADDED

This section must be completed for all new signatories. Any signatory who is not an existing member of Credit Union SA must have their identity verified.

**1.** Surname Mr/Mrs/Miss/Ms/Mx \_\_\_\_\_  
First name \_\_\_\_\_ Middle name(s) \_\_\_\_\_  
Other names commonly known by (not nicknames) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Are you a permanent Australian resident?     Yes     No  
Residential address \_\_\_\_\_  
\_\_\_\_\_  
Postal address  same as above  
\_\_\_\_\_  
Home Phone \_\_\_\_\_ Mobile \_\_\_\_\_  
Email \_\_\_\_\_  
Member no. (if existing member) \_\_\_\_\_  
Position held with entity: \_\_\_\_\_  
(ie. Director, Proprietor, Trustee, Secretary, Treasurer, Committee Member, etc)  
  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**2.** Surname Mr/Mrs/Miss/Ms/Mx \_\_\_\_\_  
First name \_\_\_\_\_ Middle name(s) \_\_\_\_\_  
Other names commonly known by (not nicknames) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Are you a permanent Australian resident?     Yes     No  
Residential address \_\_\_\_\_  
\_\_\_\_\_  
Postal address  same as above  
\_\_\_\_\_  
Home Phone \_\_\_\_\_ Mobile \_\_\_\_\_  
Email \_\_\_\_\_  
Member no. (if existing member) \_\_\_\_\_  
Position held with entity: \_\_\_\_\_  
(ie. Director, Proprietor, Trustee, Secretary, Treasurer, Committee Member, etc)  
  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**3.** Surname Mr/Mrs/Miss/Ms/Mx \_\_\_\_\_  
First name \_\_\_\_\_ Middle name(s) \_\_\_\_\_  
Other names commonly known by (not nicknames) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Are you a permanent Australian resident?     Yes     No  
Residential address \_\_\_\_\_  
\_\_\_\_\_  
Postal address  same as above  
\_\_\_\_\_  
Home Phone \_\_\_\_\_ Mobile \_\_\_\_\_  
Email \_\_\_\_\_  
Member no. (if existing member) \_\_\_\_\_  
Position held with entity: \_\_\_\_\_  
(ie. Director, Proprietor, Trustee, Secretary, Treasurer, Committee Member, etc)  
  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**4.** Surname Mr/Mrs/Miss/Ms/Mx \_\_\_\_\_  
First name \_\_\_\_\_ Middle name(s) \_\_\_\_\_  
Other names commonly known by (not nicknames) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Are you a permanent Australian resident?     Yes     No  
Residential address \_\_\_\_\_  
\_\_\_\_\_  
Postal address  same as above  
\_\_\_\_\_  
Home Phone \_\_\_\_\_ Mobile \_\_\_\_\_  
Email \_\_\_\_\_  
Member no. (if existing member) \_\_\_\_\_  
Position held with entity: \_\_\_\_\_  
(ie. Director, Proprietor, Trustee, Secretary, Treasurer, Committee Member, etc)  
  
Signature \_\_\_\_\_ Date \_\_\_\_\_

## Signatories to be REMOVED

Signatory 1 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

Signatory 2 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

Signatory 3 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

Signatory 4 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

## Signatories to REMAIN

Signatory 1 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

Signatory 2 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

Signatory 3 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

Signatory 4 - Full name \_\_\_\_\_

Member number \_\_\_\_\_

## Voting right

### Complete if to be changed

In situations where the entity is entitled to exercise a vote, the person stated below is authorised to vote on behalf of the entity.

Full name \_\_\_\_\_

## Declaration - to be signed by EXISTING account signatories

### I/we declare that this form is signed in accordance with the existing account signing authority.

I/we understand that the person's authorised to act as signatory has full powers to access the account. This includes the authority to close the account or to access it via any service attached to the account. I/we acknowledge that the credit union is not liable for any losses from the account or any damage caused by the person(s) hereby authorised to access the account.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

### Office use only

#### SECTION 1 - to be completed by branch

- Identification attached for all new signatories not current members
- Cheque account signature card attached (if applicable)

Taken by: \_\_\_\_\_

Branch: \_\_\_\_\_ Date: \_\_\_\_\_

#### SECTION 2 - to be completed by member administration

- Self Service Teller added (for signatories who are not current members)
- PayID's (owned by a removed signatory) that are linked to the account they have been removed from, have been closed (if applicable)
- Business Banking checked

Are there any overdrafts or loans?  No  Yes (if Yes, refer to Lending for approval)

- Authorised by Lending department (if applicable)

Processed by: \_\_\_\_\_ Date: \_\_\_\_\_

#### SECTION 3 - to be completed by lending dept (if applicable)

Changes authorised by \_\_\_\_\_ Date \_\_\_\_\_