



# Changing your signatories

## About this form

You can use this form to update the authorised signatories on your accounts. The details on this form will replace any instructions you have given us before.

This form has seven sections:



- 1 Your organisation
- 2 Your account management
- 3 Your key contact
- 4 Your resolution
- 5 Your existing signatories
- 6 Adding new signatories
- 7 Your internet banking levels and limits

## Before you start

We are required by law to check the identity of all individuals linked to the account. To help us verify their identity and address, we may use the information on this form. In some instances, we may need further information or documentation. If any individual linked to the account is a non-UK resident or a non-UK resident for tax purposes, we may need additional details. For more information, visit [unity.co.uk/identity](https://unity.co.uk/identity)

If you give false or inaccurate information and we identify fraud, we will pass the details on to fraud prevention agencies to stop fraud and money-laundering. For more information, visit [unity.co.uk/security](https://unity.co.uk/security)

## Using this form

-  All signatories must be aged 18 or over. All signatories will be given access to online and telephone banking on all linked accounts.
-  Completing this form does not necessarily mean we will be able to accept all signatories on your account. We carry out certain checks and procedures and will write to you when your new signatories can start signing on the account. Any missing or incomplete details will result in your application being delayed.



When you are ready and you have read the Terms and Conditions, send this form to: Customers Account Team, Unity Trust Bank, Nine Brindleyplace, Birmingham B1 2HB. We cannot accept this form electronically.

## 1. Your organisation

Organisation name

Account number(s)

## 2. Your account management

How many signatures are needed to give instructions?

- Any two  All signatures  Other please give details



When would you like to receive your statements?

We will email them to your key contact

- Annually  Half-yearly  Quarterly  Monthly

Would you like to receive paper statements instead?

- Yes  No

### 3. Your key contact

We will send all communications, stationery and statements to your nominated key contact.

#### Name

Title:	First name:
Initial(s):	Last name:

#### Position

#### Correspondence address

<input type="text"/>	
Postcode:	<input type="text"/>

#### Contact details

Phone number:	<input type="text"/>
Email address:	<input type="text"/>
Company website:	<input type="text"/>

From time to time, we may send you information on Unity products and services. Personal information will not be used for marketing purposes without your agreement. Would you like to receive marketing information?

- Email  Post  Phone  No thank you

#### Internet banking

If you are not already an internet banking user, you can register below.

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)  
 View the account and submit payments (VS)  
 View the account and authorise payments (VA)  
 View the account, submit and authorise payments (VSA)  
 Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Bank use only

Do you want the key contact to become an authorised signatory?

- Yes  No



Date of birth (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Personal address

<input type="text"/>	
Postcode:	<input type="text"/>

Previous address (if less than three years at current address)

<input type="text"/>	
Postcode:	<input type="text"/>

Tax classification

Nationality:	<input type="text"/>
Country of residence:	<input type="text"/>

## 4. Your resolution

You confirm:

- that the people named in this form will be authorised signatories on all accounts
- that instructions and changes will be given in line with the mandate
- that you are aware Unity Trust Bank may not make enquiries before acting on instructions given by any authorised signatory
- you will notify Unity Trust Bank of any changes to the organisation in writing.

This resolution has been recorded at a properly convened meeting on (DD/MM/YYYY):

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This resolution has been properly recorded in the minute book and is signed by authorised individuals such as charity trustees or officials on behalf of the organisation:

Name

Signature

Name

Signature

## 5. Your existing signatories

We need this information to check that our records are up to date. If any personal contact details have changed, please call us on **0345 140 1000** or download and complete a Change of Address form from [unity.co.uk/forms](http://unity.co.uk/forms)

### Signatory 1

Name

Title:	First name:
Initial(s):	Last name:

Position

Date of birth (DD/MM/YYYY)

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### Internet banking

If you are not already an internet banking user, you can register below.

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)
- View the account and submit payments (VS)
- View the account and authorise payments (VA)
- View the account, submit and authorise payments (VSA)
- Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

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Bank use only

### Signatory 2

Name

Title:	First name:
Initial(s):	Last name:

Position

Date of birth (DD/MM/YYYY)

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### Internet banking

If you are not already an internet banking user, you can register below.

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)
- View the account and submit payments (VS)
- View the account and authorise payments (VA)
- View the account, submit and authorise payments (VSA)
- Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

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Bank use only

## 5. Your existing signatories (continued)

### Signatory 3

Name

Title:	First name:
Initial(s):	Last name:

Position

Date of birth (DD/MM/YYYY)

### Internet banking

If you are not already an internet banking user, you can register below.

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)
- View the account and submit payments (VS)
- View the account and authorise payments (VA)
- View the account, submit and authorise payments (VSA)
- Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

Bank use only

### Signatory 4

Name

Title:	First name:
Initial(s):	Last name:

Position

Date of birth (DD/MM/YYYY)

### Internet banking

If you are not already an internet banking user, you can register below.

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)
- View the account and submit payments (VS)
- View the account and authorise payments (VA)
- View the account, submit and authorise payments (VSA)
- Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

Bank use only

## 6. Adding new signatories

Extra page  of

All signatories must read our Terms and Conditions which can be found at [unity.co.uk/terms-and-conditions](https://www.unity.co.uk/terms-and-conditions). If you need more than two authorised signatories, please reprint this page before filling it out and record the number of pages on the right.

### Signatory 1

Name

Title:	First name:
Initial(s):	Last name:

Position

Personal address

<input type="text"/>	
Postcode:	<input type="text"/>

Previous address (if less than three years at current address)

<input type="text"/>	
Postcode:	<input type="text"/>

Date of birth (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Contact details

Phone number:	<input type="text"/>
Email address:	<input type="text"/>

Tax classification

Nationality:	<input type="text"/>
Country of residence:	<input type="text"/>

### Internet banking

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)
- View the account and submit payments (VS)
- View the account and authorise payments (VA)
- View the account, submit and authorise payments (VSA)
- Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Bank use only

### Signatory 2

Name

Title:	First name:
Initial(s):	Last name:

Position

Personal address

<input type="text"/>	
Postcode:	<input type="text"/>

Previous address (if less than three years at current address)

<input type="text"/>	
Postcode:	<input type="text"/>

Date of birth (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Contact details

Phone number:	<input type="text"/>
Email address:	<input type="text"/>

Tax classification

Nationality:	<input type="text"/>
Country of residence:	<input type="text"/>

### Internet banking

Memorable name (at least three characters)

What access should they be given?

- View the account only (V)
- View the account and submit payments (VS)
- View the account and authorise payments (VA)
- View the account, submit and authorise payments (VSA)
- Authorise payments only (A)

Signature

Date signed (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Bank use only

## 7. Your internet banking levels and limits

### Authority levels

How many users are needed to make internal transfers between linked Unity Trust Bank accounts?

Single  Dual  Triple

How many users are needed to make external bill payments or standing orders?

Single  Dual  Triple

Single: payments are made by one user

Dual: payments are made by two users, with one user submitting the payment and the other authorising it

Triple: payments are made by three users, with one user submitting the payment and two others authorising it

If you would like to set up an individual as an internet banking administrator who can control the amount your users pay per transaction/per day, please give their name. Users with View only (V) access cannot be made an administrator.

### Payment limits

Our internet banking service also offers you flexible payment limits that can mirror your cheque signing mandate. You can choose the number of users and/or users you need, according to the payment amount. Please only complete this section if you need specific payment limits in addition to the authority levels on the left.

Would you like to specify who needs to be involved to make transactions over a certain amount? You can choose up to two users.

Yes please give details  No



Payments over £

Please choose one option.

Named user

Person 1:

Either named user

Person 1:

Person 2:

Both named users

Person 1:

Person 2:

What transactions do you want this payment limit to apply to?

Internal transfers  External payments

Would you like to specify the number of users who need to be involved to make transactions over a certain amount?

Yes please give details  No



Payments over £

How many users need to be involved for payments over this amount? The maximum number is three.

users

What transactions do you want this payment limit to apply to?

Internal transfers  External payments

Bank  
use only

R  S  T  I  No  S   
A        
SO