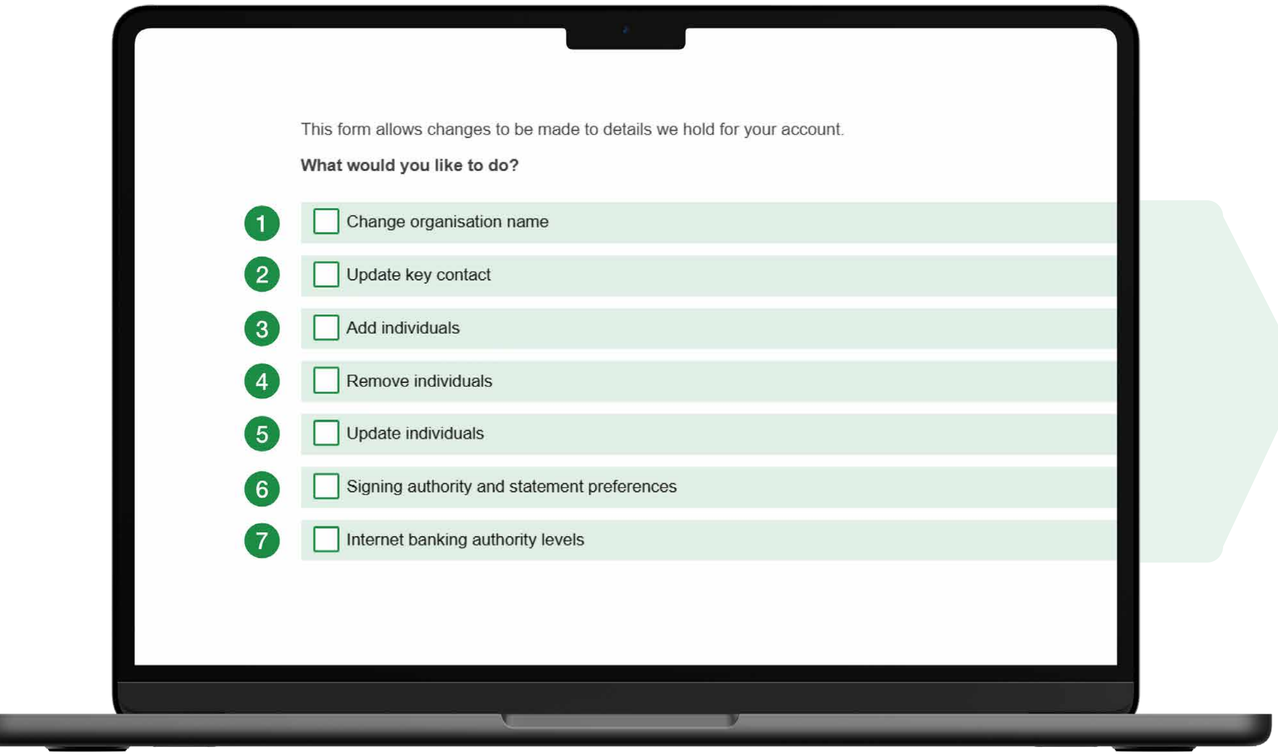
Account Management form

When completing our Account Management form, use our visual guide to ensure you provide the right information in the right place.



Find the form here: **www.unity.co.uk/update-your-account-details**

1 Change organisation name

To be used to update the registered name only. Change in legal status will require a new account however, the change in legal status does not normally apply to trade unions.

2 Update key contact

To be used for a new key contact to be added – this can include signatory permissions and internet banking permissions. NOTE – all correspondence will be sent to this address.

3 Add individuals

To be used for NEW individuals who are not associated with the account currently in any capacity – this can include signatory permissions and internet banking permissions.

4 Remove individuals

To be used for removal of a signatory, internet user or all access.
NOTE – if removing key contact, also need to click ‘Update key contact’.

5 Update individuals

To be used for existing individuals - updating personal information, add as a signatory and/or add as an internet user.

6 Signing authority and statement preference

To be used to update the account signing authority and/or statement preferences for online/paper. NOTE – not required if updating an individual’s signing authority.

7 Internet banking authority levels

To be used to update the organisation’s internet banking levels e.g. dual/ triple and payment limits e.g. amount per banking level. Includes administrator details. NOTE – not required if updating an individual’s internet authority.

Unity Trust Bank plc (‘the Bank’) is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The Bank is entered in the Financial Services Register number 204570. Our call centre opening hours are 9:00am to 5:00pm, Monday to Friday, excluding bank and public holidays in England and Wales. Registered office: Four Brindleyplace, Birmingham, B1 2JB. Registered in England and Wales no. 1713124. U1448_0626