

Triodos Bank.

Application for a Triodos Current Account with a Power of Attorney

Once we receive the fully completed form and supporting documents, we will begin to open the account and set up the Power of Attorney. Please note we cannot open the account or register an attorney on the account until we have received the required documents completed in full.

How to complete this form

The form can be completed either by printing a blank copy and filling in the required sections, or by filling in the sections online and then printing the form. The declaration at the end of the form must be signed with an original “wet ink” signature and dated by the attorney.

Supporting documents

To register a Power of Attorney with us, we also must receive:
The original or a certified copy of the Power of Attorney document or Lasting Power of Attorney access code

How to send us the required documents

You may prefer to send original or certified documents by recorded or tracked delivery to ensure they don't get lost in the post. But be aware, most delivery companies will charge for this service.

Write our full address exactly as shown below on your envelope (appropriate stamp required):

Triodos Bank
Deanery Road
Bristol
BS1 5AS

Alternatively, you can send the required documents by using our freepost address – write it exactly as shown below on your envelope (no stamp required):

Freepost TRIODOS BANK

Important Information

Please download and read this important information before proceeding further.

[Click here to read our Terms and Conditions for the Triodos Current Account,](#)

[Click here to read our Current Account Fee Information Document,](#)

[Click here to read our Personal Banking Tariff for Current and Savings Accounts,](#)

[Click here to read our Terms and Conditions for our Text Message Service,](#)

[Click here to read the Visa Secure Terms of Use,](#)

[Click here to read our Financial Services Compensation Scheme \(FSCS\) information sheet,](#)

[Click here to read our Privacy Statement,](#)

[Click here to read our Triodos Current Account – key features and what you need to know.](#)

Fields marked with an asterisk (*) are required

Section 1 Power of attorney document

Along with this form we require you to send us the original or a certified copy of the Power of Attorney document or Lasting Power of Attorney

access code from the Office of the Public Guardian's “Use a Lasting Power of Attorney service”.

To read our requirements for a certified copy of a Power of Attorney document, click [here](#).

If you have a Lasting Power of Attorney access code, please provide it below.

V-

Access codes are 13 characters long and starts with a V. For example: V-AB12-CD34-EF56.

Section 2 Account holder (Donor) details

Personal details

Full name (including title)*

Gender

Male

Female

Other / Prefer not to say

Date of birth*

Nationality*

Place of birth (town/city)*

Country of birth*

National Insurance number*

Current residential address*

Postcode

If you have lived at your current address for less than 3 years, please give your previous address(es)

Previous address

Post code

Date moved in to this address

Previous address

Post code

Date moved in to this address

Previous address

Post code

Date moved in to this address

/

Telephone number (home)

Telephone number (mobile)*

Email address*

Tax Residency

Are you tax resident in the UK?* Yes No

Are you tax resident in any country other than the UK?*

Yes No

Please see www.gov.uk/tax-foreign-income/residence if you are unsure whether you are UK tax resident.

If yes, where else are you tax resident?

Please provide your Tax Identification Number (TIN) or equivalent for each country where you are tax resident.

Country

TIN

Country

TIN

United States Tax Liability

Are you a United States person?

Please see www.irs.gov for more details

A 'United States person' includes citizens and residents of the United States.

Yes No

Section 3 Attorney details

Full name (including title)*

Are you an existing Triodos Bank customer?*

Yes

Please provide your account number below, then proceed to section 4.

Account number

No Please complete the rest of this section

Gender

Male* Female* Other / Prefer not to say*

Date of birth*

/

Nationality*

Place of birth (town/city)*

Country of birth*

National Insurance number*

Current residential address*

Post code

If you have lived at your current address for less than 3 years, please give your previous address(es)

Previous address

Post code

Date moved in to this address

/

Previous address

Post code

Date moved in to this address

/

Previous address

Post code

Date moved in to this address

/

Telephone number (home)

Telephone number (mobile)*

Email address*

Section 4 Security details

Security word*

This must be between 8 and 20 characters. Please use something that will not be easy for others to guess or find out about you. You will be asked this when you call us and log into Internet Banking. If you are an existing customer this will replace your existing security word. The whole of your security word will be asked for if we need to discuss your details over the phone.

Name of first school attended*

You may be asked this when you call us

Section 5

Mailing preferences

At Triodos Bank, we believe dialogue is crucially important and we value the opportunity to share our mission and impact. At the same time, transparency has always been a core value of the bank, and this extends to how we use your data. We believe it is important to deal with your money consciously, and we do the same with your data.

We won't share your information with anyone else without informing you and will only share your data with other organisations required to complete processing necessary to provide our products and services. For information about how Triodos Bank use and share your personal information please see our Privacy Statement at www.triodos.co.uk/privacy-statement. By applying for Power of Attorney, you acknowledge and understand that your personal data will be processed and stored for future reference in accordance with this Privacy Statement.

Instructions for correspondence

- Please send all future correspondence to the account holder (Donor)
- Please send all future correspondence to the Attorney

We only allow one attorney to receive future correspondence. Please provide the full name of the attorney we should send future correspondence to.

The impact of our customers' money

We take a responsible and considered approach to how we communicate by email, telephone and post. We won't share information with anyone else. Let us know your preferences below. You can change your preferences at any time.

Triodos Bank customers care about what their money does. Our 'Colour of Money' publication, email newsletter and other inspirational pieces are a great way to stay connected with the projects and organisations that our customers help to finance.

- Yes, I want to receive news about positive impact
- By email By post
- No, I don't want to receive news about positive impact

Accounts and services

We would like to keep you up-to-date with our accounts and services and will only send you information that we believe may be of interest to you.

- Yes, I want to receive information about accounts and services
- By email By post
- No, I don't want to receive information about accounts and services

If you are an existing customer this will replace your current selections.

Section 6

Declaration

To be completed by the Attorney

I/We consent that I/we have read and accepted the Triodos Current Account Terms and Conditions. I/We acknowledge receipt of the FSCS Information Sheet.

I/We consent to the checks being made with credit reference agencies as part of this application and understand that this will leave a footprint against my/our credit record.

I/We acknowledge your right to suspend operations, and delay opening, on this account until satisfactory details about my/our identification have been supplied. I/We confirm that the information given is true and complete and I/we agree to be bound by the Terms and Conditions in force.

I/We authorise you to make any enquiries that you may deem necessary to confirm the details on this form. I/We confirm that if false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention agencies to prevent fraud and money laundering. (Further details explaining how the information held by fraud prevention agencies may be used can be found in the account Terms and Conditions)

Signature*

Date* / /

Along with this form, **please ensure you send us the original or a certified copy of the power of attorney document if you have not provided us with a Lasting Power of Attorney the Access Code.**

What happens next

We will verify the Power of Attorney and this application form and carry out checks to confirm your identity and address.

If we need any further documentation or information, we will contact you.

If we are able to confirm your details, we will send you a letter confirming that Power of Attorney has been added to the relevant account(s).

If you are a sole attorney or an attorney appointed "jointly and severally", we will issue you a debit card for the account. If you are an attorney appointed "jointly", we cannot issue you a debit card.

Large print, braille and audio versions available on request.

Telephone: 0330 355 0355
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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