

Business Banking  
Change of loan account  
operator form.

This form enables you to add or remove account operators and authorised enquirers to your Triodos Bank loan account. You can choose how these individuals can access the loan account.

You can also use this form to request Internet Banking access for existing account operators and update your signing mandate and/or Internet Banking arrangements.

**For your request to be processed the declaration at the end of this form must be signed by two directors (or sole director if applicable), members, partners, sole trader or trustees authorised to sign on behalf of the organisation i.e. new account operators to be added as part of this request cannot provide authorisation. For security reasons, please print and provide a handwritten signature.**

Please note if your form does not fulfill the requirements outlined above, we will be unable to complete your request and your form will be returned to you.

If you require clarification of your account mandate(s) and/or signing arrangements, please contact us on 0330 355 0355 or via secure message in Internet Banking. Please do this before submitting your form to avoid any delays in completing your request once received. Please note that information will only be provided to existing account operators.

## Your organisation

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Official name of your organisation (as shown on any official documents where applicable)

Triodos Bank loan account number(s) you want to add or remove account operators or authorised enquirers to or from:

All accounts held by the organisation named above

# Remove account operators and authorised enquirers

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This section allows you to remove account operators and authorised enquirers from the account(s).

Full Name of person to be removed in **block capitals**

1. Title                      First name(s)

Surname

Is this person still associated with the organisation?    Yes                      No

2. Title                      First name(s)

Surname

Is this person still associated with the organisation?    Yes                      No

3. Title                      First name(s)

Surname

Is this person still associated with the organisation?    Yes                      No

4. Title                      First name(s)

Surname

Is this person still associated with the organisation?    Yes                      No

## Contact person

If you are removing your current contact person, please provide details of a new contact person below. **(Contact person must be an account operator listed on all accounts).**

Title                      First name(s)

Surname

Correspondence address

Postcode

Organisation email

Website

# Add loan account operators and authorised enquirers

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This section allows you to add account operators and authorised enquirers to the loan accounts. You can also use this section to request Internet Banking access for existing account operators.

## **Important notice for all new and existing customers**

Internet Banking access is provided by means of an individual security device known as a Digipass. If you are an existing customer already using a Digipass to access your other business account(s), please provide the existing Digipass number in the relevant box.

We are required by law to check the identity of all new and existing customers. To help us verify identity and address we may make an electronic search, using the information you have supplied on this form. In some instances we may ask you to send in further information or documents. Please see our Terms and Conditions for further information.

If more than four account operators or authorised enquirers are required, please copy the following section and include with the form.

Any details provided on this form will replace the information we already hold on record.

## **How we use your personal information**

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](http://www.triodos.co.uk/privacy-statement). By applying to be an account operator or authorised enquirer, you acknowledge and understand that your personal data will be processed and stored for future reference in accordance with this Privacy Statement.

**Account operator / authorised enquirer 1**

Title Mr Mrs Ms Miss Dr Other

First name(s)  
(For identification purposes, please use your full name and not a nickname)

Surname Male Female

Date of birth / /

Country of birth Nationality

Position within organisation

Residential address

Postcode

Telephone (home)

Telephone (work)

Mobile Email

(By providing us with your telephone number and email address you are giving us permission to use these to contact you)

How long have you lived at your current address?

If you have lived at your current address for less than a year please give your previous address below

Address

Postcode

**Administration rights:**

(Please tick **one** of the following)

**Account operator** – can obtain information about the account, sign written instructions and make transactions

**Authorised enquirer** – can obtain information about the account but cannot sign written instructions or make transactions

Does this person need Internet Banking access? Yes No

Email  
(it will not be possible to set up internet banking without this information)

Existing Digipass number (if applicable)

Should this person be able to view loan account(s) using Internet Banking (if applicable)?

Yes          No

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

**Declaration**

I agree to be bound by the Terms and Conditions for businesses and charities and any specific terms and conditions applying to this account. I understand how the details contained on this form can be processed and I acknowledge your right to postpone my inclusion as an account operator/authorised enquirer on this account(s) until I have supplied to Triodos Bank any documentation or information that may be required.

Signature of the above named

Date

/          /

**Account operator / authorised enquirer 2**

Title Mr Mrs Ms Miss Dr Other

First name(s)  
(For identification purposes, please use your full name and not a nickname)

Surname Male Female

Date of birth / /

Country of birth Nationality

Position within organisation

Residential address

Postcode

Telephone (home) Telephone (work)

Mobile Email

(By providing us with your telephone number and email address you are giving us permission to use these to contact you)

How long have you lived at your current address?

If you have lived at your current address for less than a year please give your previous address below

Address

Postcode

**Administration rights:**

(Please tick **one** of the following)

**Account operator** – can obtain information about the account, sign written instructions and make transactions

**Authorised enquirer** – can obtain information about the account but cannot sign written instructions or make transactions

Does this person need Internet Banking access? Yes No

Email  
(it will not be possible to set up internet banking without this information)

Existing Digipass number (if applicable)





**Account operator / authorised enquirer 3**

Title Mr Mrs Ms Miss Dr Other

First name(s)  
(For identification purposes, please use your full name and not a nickname)

Surname Male Female

Date of birth / /

Country of birth Nationality

Position within organisation

Residential address

Postcode

Telephone (home)

Telephone (work)

Mobile Email

(By providing us with your telephone number and email address you are giving us permission to use these to contact you)

How long have you lived at your current address?

If you have lived at your current address for less than a year please give your previous address below

Address

Postcode

**Administration rights:**

(Please tick **one** of the following)

**Account operator** – can obtain information about the account, sign written instructions and make transactions

**Authorised enquirer** – can obtain information about the account but cannot sign written instructions or make transactions

Does this person need Internet Banking access? Yes No

Email  
(it will not be possible to set up internet banking without this information)

Existing Digipass number (if applicable)

Should this person be able to view loan account(s) using Internet Banking (if applicable)?

Yes          No

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

Loan Account(s) Number

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Signature of the above named

Date

/          /

**Account operator / authorised enquirer 4**

Title Mr Mrs Ms Miss Dr Other

First name(s)  
(For identification purposes, please use your full name and not a nickname)

Surname Male Female

Date of birth / /

Country of birth Nationality

Position within organisation

Residential address

Postcode

Telephone (home)

Telephone (work)

Mobile Email

(By providing us with your telephone number and email address you are giving us permission to use these to contact you)

How long have you lived at your current address?

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Address

Postcode

**Administration rights:**

(Please tick **one** of the following)

**Account operator** – can obtain information about the account, sign written instructions and make transactions

**Authorised enquirer** – can obtain information about the account but cannot sign written instructions or make transactions

Does this person need Internet Banking access? Yes No

Email  
(it will not be possible to set up internet banking without this information)

Existing Digipass number (if applicable)

Should this person be able to view loan account(s) using Internet Banking (if applicable)?

Yes          No

Loan Account(s) Number

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Loan Account(s) Number

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Loan Account(s) Number

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Signature of the above named

Date

/          /

# Declaration

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For your request to be processed this declaration must be signed by existing two directors (or sole director if applicable), members, partners, sole trader or trustees authorised to sign on behalf of the organisation i.e. new account operators to be added as part of this request cannot provide authorisation. Please note if your form does not fulfil the requirements outlined above, we will be unable to complete your request and your form will be returned to you.

## Authorisation of changes to account operators

Please act as per the instruction provided in this form. I/we authorise you to make any enquiries that you consider necessary to confirm the details on this form and confirm that the information provided on this form is true to the best of my/our knowledge.

Account Operator name

Signature

Date

/ /

Account Operator name

Signature

Date

/ /

Once completed please send this form to our freepost address (no stamp required):

**Freepost TRIODOS BANK**

# For bank use only

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Date stamp

Telephone: 0330 355 0355

[contact@triodos.co.uk](mailto:contact@triodos.co.uk)

[www.triodos.co.uk](http://www.triodos.co.uk)

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

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