

Triodos Bank.

Application to add a new account holder to the Triodos Current Account

This form enables you to apply to add a new joint account holder to your Triodos Current Account. Please contact us if you wish to be added to any other accounts.

This form should be completed either by printing a blank copy and filling in the required fields, or by filling in the fields online and then printing the form. The declaration at the end of this form must be signed and dated by both the existing and new account holders, and then the completed form should be returned to us at our Freepost address. Our Freepost address is Royal Mail registered and simple to use. Write it exactly as shown below on your envelope and your letter will get to us free of charge (no stamp required):

Freepost TRIODOS BANK

Important Information

Please download and read this important information before proceeding further.

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

[Click here to read our Tariff for personal accounts](#)

[Click here to read 'Triodos Current Account - What you need to know'](#)

[Click here to read the FSCS Information Sheet](#)

[Click here to read the Terms and Conditions for our text message service](#)

*Section 13 of these terms contains key information on joint accounts, as does the further information section at the end of this form. Please ensure that you read this carefully.

Section 1: New account holder details

Account details

Account number

This is the account to which the new account holder will be added

Personal details

Full name (including title)

Male Female

Date of birth

/ /

Nationality

Place of birth (town/city)

Country of birth

National Insurance number

- - - -

Permanent residential address

Post code

How long have you lived at your current address?

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)*

*We strongly recommend that you provide us with your mobile telephone number. This will be used to contact you via text with important information regarding your account - for example if your account balance is low or if you do not have funds in the account to cover a payment. As we do not offer unarranged overdrafts it is important that we can contact you if required to ensure you are kept up to date on your account. None of your contact details will be used for marketing unless you give us specific permission.

Email address

Security information

If you are an existing Triodos Bank customer you should not complete this section. We will use your existing security word.

Security word (case sensitive)

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. The whole of your security word will be asked for if we need to discuss your details over the phone.

We recommend updating your security word the first time that you log into Internet Banking. Please see Section 5 of the Terms and Conditions for the Triodos Current Account for more information on security.

Name of first school attended

You may be asked this when you call us

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 if 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

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

Employment status (please tick one of the below options)

Employed Self employed Full-time education

Homemaker/carer Retired Key/Part time

Unemployed

Time in current status years months

Residential status

Your residential status (please tick one of the below options)

Owner occupier Joint owner Living with parents

Tenant - furnished Tenant - unfurnished

Council tenant Other tenant Other Not given

Your income

Your annual income before tax

Your regular income: for example salary, pension or benefits

Your additional income

For example dividends and investment income

Your expenditure

Your total regular monthly outgoings

For example mortgage, rent, household bills, council tax, food or travel

Section 2: Mailing preferences

Sign up to receive further information from us

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.

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. By applying for this product, you acknowledge and understand that your personal data will be processed and stored for future reference in accordance with this Privacy Statement.

Receive marketing about our products and services

Let us know if you would like to be kept up-to-date with information about our products and services that we believe may be of interest to you.

By email

By post

Please don't send

Receive inspiring news

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

Let us know if you'd like to stay connected to the projects and organisations that money from Triodos Bank customers helps to finance. This includes receiving our 'Colour of Money' publication, email newsletters and other inspirational communications such as invitations to events, competitions and stories.

By email

By post

Please don't send

Selecting option 'By email' means you will also receive our Colour of Money publication by post.

Note: If you are already a Triodos Bank customer this will replace your current preferences.

You can change your preferences at any time in Internet Banking.

Section 3: Further information on joint accounts and declaration

Further information

We are entitled to accept the authority of any joint account holder to give instructions on behalf of all other account holders relating to the account until any authority is cancelled or treated by us as cancelled.

You will each have joint and several liability for any arranged or unarranged overdraft on your joint account. This means that if any outstanding balances are not paid when they are due, we can pursue either or both of you to repay the total amount owed to us. Please see Section 6 of the Terms and Conditions for the Triodos Current Account for more information on liability.

I/We consent that I/we have read and accepted the above information.

Declaration

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 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)

New Account Holder Signature

Date / /

Existing Account Holder signature

Date / /

What we will do next

We will verify the information you have provided and carry out checks to confirm your identity and address.

If we need any further information we will contact you within five working days.

If your application is successful, then we will send you confirmation that you have been added to the account.

If for any reason your application is unsuccessful, then we will write to you and explain why.

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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