

# Triodos Bank. Power of Attorney Mandate Form.

We require each attorney to complete and send us this form.

Once we receive the fully completed form and supporting documents, we will begin to set up the Power of Attorney. Please note we cannot register an attorney on a donor's 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**

Fields marked with an asterisk (\*) are required

## Section 1 Power of Attorney document

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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's (Donor's) details

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Full Name\*

Current residential address\*

Postcode

Account Number(s)\*

List all the accounts the donor has granted Power of Attorney for, that you are aware of.

## Section 3 Attorney's details

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Full Name\*

Are you an existing Triodos Bank customer?\*

Yes

Please provide your account number below, then proceed to section 4. We will add the attorney to any accounts that the customer holds unless the Power of Attorney document has separate instructions.

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\*

Postcode

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

Previous address

Postcode

Date moved into this address

/ /

Previous address

Postcode

Date moved into this address

/ /

Previous address

Postcode

Date moved into this address

/ /

Telephone number (home)

Telephone number (mobile)\*

Email address\*

## Section 4 Security details

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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. 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.

If you are registering Power of Attorney for a Triodos Current Account, please provide the name of the first school you attended:

Name of first school you attended

You may be asked this when you call us

## Section 5 Mailing preferences

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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](http://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.

By mail      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.

By mail      By Post

No, I don't want to receive news about positive impact

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

# Section 6 Declaration

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## To be completed by the attorney

I confirm that the information given is true and complete and I agree to be bound by the general terms in force from time to time, and any specific Terms and Conditions applying to the account(s). Please refer to our website for specific account terms and conditions.

I authorise you to make any enquiries that you may deem necessary to confirm the details on this form. Please note that we may need to ask for further proof of identification. I 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(s) Terms and Conditions).

Signature\*

Date\*

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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 the Power of Attorney Mandate 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 Power of Attorney is for a Triodos Current Account and 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](http://www.triodos.co.uk)

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

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**Triodos @ Bank**

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