

ADDITION OF PARTY FORM

PERSONAL / SOLE TRADER / COMPANY / TRUST / PARTNERSHIP



Membership Details

Membership number _____ Date _____

Membership name _____

ADDITIONAL PARTY ONE - Existing relationship with Heritage

Do you have an existing relationship with Heritage (Y/N): _____ For example, do you have a membership or are you listed as a signatory on another membership.

If yes, listing existing member number: _____

Personal Details - Party One

Authorised Signatory Executor Token Holder *Enquiry Access Only

Director Secretary Beneficiary Trustee Partner (only add a trustee/partner at account opening)

Title _____ Surname _____

Given Names _____

Commonly know as _____

*First school attended _____

*Mother's maiden name _____

Date of birth ____ / ____ / ____ Gender (M/F) _____ Drivers licence _____

*Residential Address Details

Property _____ Unit/flat # _____ House # _____

Street name _____ Street type _____

Suburb: _____ State _____ Postcode _____

Mailing Address Details (if different to residential address)

Mail address _____

Suburb: _____ State _____ Postcode _____

*Contact Details

Home _____ Work _____ Mobile _____

Other _____ Relationship _____

Foreign Tax residency certification

Are you, for Tax purposes, a resident of any country other than Australia? No Yes

If YES, please complete the below "Common Reporting Standard details: Resident of a foreign country" section to complete your application.

Common Reporting Standard details: Resident of a foreign country

| | Country / Jurisdiction of Tax residence | TIN (Taxpayer Identification Number) | If no TIN available, select reason: A The country/jurisdiction where the Account Holder is resident does not issue TINs B Unable to provide to the bank due to the law by country/ Jurisdiction of tax residence C Unable to obtain a TIN or equivalent (please state reason why) |
|---|---|--------------------------------------|--|
| 1 | | | A B C |
| 2 | | | A B C |
| 3 | | | A B C |

*Specimen Signature

Foreign Country Tax Information Declaration

I/we declare: - that the information provided in this form is correct and reflects my/our tax residency status;
- that I/we will update Heritage immediately if my/our tax residency status is to change in the future.

I/we acknowledge that the information contained in this form and information regarding the Account Holder(s) and any Reportable Account(s) may be provided to the Australian Taxation Office and exchanged with tax authorities of another country/jurisdiction or countries/jurisdictions in which the Account Holder(s) may be tax resident pursuant to intergovernmental agreements to exchange financial account information.

Signature of Additional Party One _____

NOTE: If adding a person with Enquiry Access Only, complete fields marked with*.

ADDITIONAL PARTY TWO - Existing relationship with Heritage

Do you have an existing relationship with Heritage (Y/N): _____ For example, do you have a membership or are you listed as a signatory on another membership.

If yes, listing existing member number: _____

Personal Details - Party Two

- Authorised Signatory Executor Token Holder *Enquiry Access Only
 Director Secretary Beneficiary Trustee Partner (only add a trustee/partner at account opening)

Title _____ Surname _____

Given Names _____

Commonly know as _____

*First school attended _____

*Mother's maiden name _____

Date of birth ____ / ____ / ____ Gender (M/F) _____ Drivers licence _____

*Residential Address Details

Property _____ Unit/flat # _____ House # _____

Street name _____ Street type _____

Suburb: _____ State _____ Postcode _____

Mailing Address Details (if different to residential address)

Mail address _____

Suburb: _____ State _____ Postcode _____

*Contact Details

Home _____ Work _____ Mobile _____

Other _____ Relationship _____

Foreign Tax residency certification

Are you, for Tax purposes, a resident of any country other than Australia? No Yes

If YES, please complete the below "Common Reporting Standard details: Resident of a foreign country" section to complete your application.

Common Reporting Standard details: Resident of a foreign country

| | Country / Jurisdiction of Tax residence | TIN (Taxpayer Identification Number) | If no TIN available, select reason: A The country/jurisdiction where the Account Holder is resident does not issue TINs B Unable to provide to the bank due to the law by country/ Jurisdiction of tax residence C Unable to obtain a TIN or equivalent (please state reason why) |
|---|---|--------------------------------------|--|
| 1 | | | A B C |
| 2 | | | A B C |
| 3 | | | A B C |

*Specimen Signature

Foreign Country Tax Information Declaration

I/we declare: - that the information provided in this form is correct and reflects my/our tax residency status;
- that I/we will update Heritage immediately if my/our tax residency status is to change in the future.

I/we acknowledge that the information contained in this form and information regarding the Account Holder(s) and any Reportable Account(s) may be provided to the Australian Taxation Office and exchanged with tax authorities of another country/jurisdiction or countries/jurisdictions in which the Account Holder(s) may be tax resident pursuant to intergovernmental agreements to exchange financial account information.

Signature of Additional Party Two _____

NOTE: If adding a person with Enquiry Access Only, complete fields marked with*.

Account holder / Authorised account opener acknowledgement

PERSONAL / SOLE TRADER / COMPANY / TRUST / PARTNERSHIP ACCOUNTS: I/we certify that authority has been given to those nominated on this form to conduct operations on behalf of me/us. This signing authority will extend to all accounts and term deposits operated under the above member number and will remain in force until Heritage receives notice in writing of the cancellation thereof.

CHEQUE ACCOUNTS: This does not refer to cheques dated prior to the date hereof and presented for payment on or after such date.

Signature of Account Holder / Authorised Account Opener

Signature of Account Holder / Authorised Account Opener

| | | | | | | |
|-----------------|---------------|--------|----------|------------------------------|----------------|-----------------------------|
| Branch use only | Branch Stamp: | Coded: | Checked: | Verification obtained (Y/N)? | CSO Signature: | Checking Officer Signature: |
| | | | | | | |