

# AMENDMENT FORM - PERSONAL ACCOUNTS

# Heritage Bank

## Member details

Member number: \_\_\_\_\_ Date: \_\_\_\_\_

Membership name: \_\_\_\_\_

**Note:** For all two or more to sign memberships, ALL account holders must sign this form to update the membership mailing address or the number to sign on the account. If you have any linked memberships please list these in the member number/s section.

## Signing authority change

Number to sign on account: \_\_\_\_\_ of \_\_\_\_\_ to sign Is there a special signing authority ☐ Yes ☐ No

If yes, list name of person: \_\_\_\_\_

## Change of mailing / email address details - Membership

Membership mailing address: \_\_\_\_\_

\_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Membership email address: \_\_\_\_\_

## Personal detail changes for an individual party to the membership

### Party to whom the change relates

Title: \_\_\_\_\_ Surname: \_\_\_\_\_

Given names: \_\_\_\_\_

### Security Questions:

Mother's maiden name: \_\_\_\_\_ Customer's first school: \_\_\_\_\_

**New residential address** (write 'as above' if same as membership mailing address)

\_\_\_\_\_

\_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

**New postal address** (write 'as above' if same as membership mailing address)

\_\_\_\_\_

\_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

### New contact details

Home: \_\_\_\_\_ Work: \_\_\_\_\_ Mobile: \_\_\_\_\_

Other: \_\_\_\_\_ Relationship: \_\_\_\_\_

## Account holder / authorised account opener acknowledgement

I/We request Heritage to change my/our personal details to the new details recorded on this form under the member number specified above.

I/We declare that I/we am/are one and the same as the person/s with the full name above currently on Heritage's records and further acknowledge that any mortgages or other securities for loans under the relevant member number will remain in force even though the land, vehicle or other property concerned may not be in my new name.

**All parties to a loan account must sign.**

\_\_\_\_\_  
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:

NOTE: It is an offence under the Financial Transaction Reports Act 1988 and the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 to give false and misleading information.

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