

A general guide to help complete a smart form

Q - How do I complete the smart form?

A - Please download and save the form to your own computer before completing. Once saved, we recommend that the form is completed in one attempt. The form should be completed on screen and in sequential order. This is because your answers in one section may expand or change the later sections of the form.

Q - Why can't I enter text or numbers into some fields?

A - In most cases where numbers are required, e.g. a telephone number, trying to key letters will not move the cursor in the box. The field should work properly when the correct type of character is entered.

Q - How do I know that the correct sections are populated for me to enter information?

A - Ensure that 'Enter' key is pressed every time an entry is completed, particularly where a number has been selected or prepopulated to ensure the relevant sections become visible.

Q - Why are some fields within the form mandatory?

A - The form is designed to ensure that we capture all of the relevant information for your application which will increase the likelihood of your request being processed promptly.

Q - If I make a mistake, can I change my answers?

A - Yes. Please delete the original entry and press enter (or tab if in an expandable box). Please make sure after the change to re-check that all subsequent sections of the form are complete as your amendment may have added sections or caused some entries to be lost.

Q - I have completed the form, can I change my answers?

A - Yes. Please delete the original answer or change the number and press enter (or tab if in an expandable box). Please make sure after the change to re-check that all subsequent sections of the form are complete as your amendment may have added sections or caused some entries to be lost.

Q - Once the form is complete, what should I do next?

A - Once completed please print the form and obtain the signatures of all those named as parties to the account. Please note that any parties who are not already customers of the bank will need to provide two forms of identification; one to confirm their identity and another to confirm their address. Acceptable forms of identification are noted below. Identification should be provided at the same time the form is handed into a local branch.

Acceptable forms of identification:

To prove your identity you can choose one document from the following:

- Your full Passport
- Your national identity photocard (EEA or equivalent)
- Your full photocard driving licence issued by a member state of EU or EEA

Please note - All documents must be valid, signed and quote your full legal name.

To prove your address you can choose one document from the following:

- Utility bill, e.g. Gas, Electricity, Water, Telephone - Must be less than 6 months old

If you are sending a telephone bill please provide all pages of the bill. Please note we cannot accept copies of e-statements, mobile telephone bills or statements from an internet provider

- Bank / Building Society / Credit Card Statement - Must be less than 6 months old and from an EU or EEA based bank
- Mortgage statements - Must be less than 1 year old
- Insurance Policy Documents - Must be current, not expired and issued an EU or EEA based company. Certificates or whole policy documents are acceptable but renewal notices are not
- National Identity Card - Cannot be accepted to verify your address if it was previously used to verify your identity. Must be current, valid & signed and issued by an EU or EEA jurisdiction. It must show your current residential address

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