

Guidance Notes

- Please use this form to add a Third party to a Sole, Joint or Sole Trader account.
- Please do not add any additional clauses to this document or amend the existing clauses.
- Please ensure all signatures are within the margins of the boxes provided.

ISLE of MAN BANK

Third Party Mandate
Authority by customer(s) for another person to operate account(s) and to give Instructions with regards to Securities etc. NB this covers Instructions in writing, by telephone and/or electronic means
(Not to be used by Trustees, Company, Partnership, Limited Liability Partnership, Club, Society or Unincorporated Body)

Please note – when filling out this form, please use the tab and arrow keys to move between the relevant fields. Do not use the return or enter keys. If completing by hand please use BLOCK CAPITALS and black ink.

Enter the full name(s) of the account holder(s) including the account trading name where appropriate.

1. Authority

Date (DD/MM/YYYY)

Insert the date.

For example
11 01 2021.

*I/We, the undersigned (full names) _____

hereby authorise you, The Royal Bank of Scotland International Limited trading as Isle of Man Bank ('You/Your') to accept and act on Instructions on *my/our Account(s) with You as listed below

Sort code	Account number	Account number	Account number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Insert Sort Code and account numbers of accounts to which this mandate is to apply.

from the person(s) named as Agent on the separate sheet(s) certified as correct by me or any of us. The undersigned Account holder(s), even if the Account(s) become(s) overdrawn as a result of the Instruction and *I/we agree that any debt or liability incurred on *my/our behalf by the Agent shall be *my/our responsibility (if a joint account, each of us can be held fully responsible for any debt or liability). If more than one person is named as Agent on the separate sheet(s), *I/we confirm that You may accept Instructions from any one of them.

'Account' means the above Account(s) in my/our name(s) with You on which the Agent(s) is/are permitted to give You Instructions.

'Instructions' in this authority means

(i) Instructions for operations on the Account(s), and includes, without limitation, Instructions authorising Account withdrawals and closures;

(ii) Instructions for the provision and/or amendment of information relating to the Account(s);

(iii) Instructions to release items held in security to the custodian in my/our name.

'Security Procedure' means the process of confirming an Instruction by the use of the security details agreed between You and the Agent(s) or in the case of telephoned Instructions the procedure You follow, as You may consider necessary, to be satisfied of the identity of the caller.

*I/We confirm that You are authorised to accept and rely on Instructions given by the Agent(s) in writing or in any form that is not in writing ('writing' means for this purpose a document bearing an original written authorised signature(s)) and where not in writing which includes, without limitation, by telephone and/or electronic means (for example by computer) when the Instruction has been confirmed by the Security Procedure. Where Instructions are given by electronic means, *I/we, together and separately, accept responsibility for all Instructions received by You between the time the Agent(s) passes the Security Procedure until the Agent(s) exits from Your site. *I/we understand that this includes any input errors made by the Agent(s) or Instructions sent or input errors made by someone (other than the Agent(s)) using the computer while still logged onto Your site but left unattended by the Agent(s).

*I/We understand that *I/we may at any time cancel the Agent's(s) authority to give You Instructions. If this happens You will be given notice by me or any of us but until receipt by You of that notice You will be entitled to continue to act on the Instructions of the Agent(s). *I/We confirm that You are under no obligation to ascertain the purpose for which the Agent(s) exercises the foregoing authorities or to validate the same with me or any one of us.

2. Customer signature(s) – please sign within the margins of the box(es)

Signature(s) of all Account holder(s)

Customer signature

Witness' signature

Witness' name

Witness' address

Name (in full)

Witness' occupation

Customer signature

Witness' signature

Witness' name

Witness' address

Name (in full)

Witness' occupation

* delete as appropriate

Continue overleaf if more than 2 Parties to the Account(s)

The signature of account holder(s) must be witnessed by an independent individual.

(This must not be any third party named on the mandate).

All Account holder(s) to sign here.

Guidance Notes (contd.)

Please ensure all signatures are within the margins of the boxes provided.



Third Party Mandate Authorised Signatory Sheet

2. Customer signature(s) (continued) – please sign within the margins of the box(es)

Please insert the signature of the Account Holder(s), **only** where there are more than three parties to the Account.

Customer signature

Name (in full) _____

Customer signature

Name (in full) _____

Witness' signature _____

Witness' name _____

Witness' address _____

Witness' occupation _____

Witness' signature _____

Witness' name _____

Witness' address _____

Witness' occupation _____

The signature of account holder(s) must be witnessed by an independent Individual.
(This must not be any third party named on the mandate).

Insert Full name of Agent (Third Party)

3. Declaration by Agent – if there is more than one Agent, the declaration is given by each Agent separately, not jointly.

Agent's full name _____

I, the Agent, confirm that for giving Instructions to You by any means, including without limitation by telephone or electronic means (for example only, by computer) I will comply with any Terms and Conditions notified by You to me as applying to Instructions given to You by any of those means. In particular, without limitation:-

- (a) I will keep my security details secret.
- (b) I will take all reasonable precautions to prevent the fraudulent use of my security details.
- (c) I will not record my security details in any way, which may result in them becoming known to another person.
- (d) If I suspect someone knows my security details I will contact you immediately.

I agree to Your using my information in the manner detailed on the attached Guidance Notes for the purpose of verifying my identity.

Signature of Agent (Third Party)

Signature of Agent (Third Party).

4. Customer confirmation

The signature(s) given on this sheet is/are correct.

Signature of Account holder (must be one who has signed the front of the mandate)

Please insert the Signature of the Account Holder.

Total number of signatories on this sheet

The total number of Authorised Signatories in Section 2 and on any additional Authorised Signatories pages is

This should be completed with the total number of Authorised Signatories including any on additional page(s).

Please note – when filling out this form, please use the tab and arrow keys to move between the relevant fields. Do not use the return or enter keys. If completing by hand please use BLOCK CAPITALS and black ink.

1. Authority

Date (DD/MM/YYYY)

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hereby authorise you, The Royal Bank of Scotland International Limited trading as Isle of Man Bank ('You/Your') to accept and act on Instructions on *my/our Account(s) with You as listed below

Sort code

Account number

Account number

Account number

from the person(s) named as Agent on the separate sheet(s) certified as correct by me or any one of the undersigned Account holder(s), even if the Account(s) become(s) overdrawn as a result of the Instructions and *I/we agree that any debt or liability incurred on *my/our behalf by the Agent shall be *my/our responsibility (if a joint account, each and all of us can be held fully responsible for any debt or liability). If more than one person is named as Agent for any of the Account(s), *I/we confirm that You may accept Instructions from any one of them.

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*I/We confirm that You are authorised to accept and rely on Instructions given by the Agent(s) in writing or in any form that is not in writing ['writing' means for this purpose a document bearing an original written authorised signature(s)] and where not in writing which includes, without limitation, by telephone and/or electronic means (for example by computer) when the Instruction has been confirmed by the Security Procedure. Where Instructions are given by electronic means, *I/we, together and separately, accept responsibility for all Instructions received by You between the time the Agent(s) passes the Security Procedure until the Agent(s) exits from Your site. *I/We understand that this includes any input errors made by the Agent(s) or Instructions sent or input errors made by someone (other than the Agent(s)) using the computer while still logged onto Your site but left unattended by the Agent(s).

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Signature(s) of all Account holder(s)

Customer signature

Witness' signature

Witness' name

Witness' address

Name (in full) _____

Witness' occupation _____

Customer signature

Witness' signature

Witness' name

Witness' address

Name (in full) _____

Witness' occupation _____

*delete as appropriate

Continue overleaf if more than 2 Parties to the Account(s)

2. Customer signature(s) (continued) – please sign within the margins of the box(es)

Customer signature

Witness' signature _____

Witness' name _____

Witness' address _____

Name (in full) _____

Witness' occupation _____

Customer signature

Witness' signature _____

Witness' name _____

Witness' address _____

Name (in full) _____

Witness' occupation _____

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4. Customer confirmation

The signature(s) given on this sheet is/are correct.

Signature of Account holder (must be one who has signed the front of the mandate)

The total number of Authorised Signatories in Section 2 and on any additional Authorised Signatories pages is

Your Information

We collect and process various categories of personal and financial information throughout your relationship with us, to allow us to provide our products and services and to run our business. For more information about how we use your personal information, the types of information we collect and process and the purposes for which we process personal information, please read our Privacy Notice provided on our website at <https://www.iombank.com/global/privacy-notice.html>. We may update this from time to time and would encourage you to visit our website regularly to stay informed of the purposes for which we process your information and your rights to control how we process it.