

### 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.

**Please note** – when filling out this form please use the tab and arrow keys to move between the relevant fields. Ensure you do **not** use the return or enter keys. Please complete in BLOCK CAPITALS and mark option boxes with an 'X'.

### 1. Account details

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

For joint account customers: most joint account customers have told us to accept instructions signed by any one party, in which case only one signature is needed. If joint account holders live at separate addresses, a separate form per account holder is required. If sole accounts are held then a separate form will be needed or this form must be signed by the sole account holder.

### 2. New address details

This amendment is to take effect immediately  **OR** With effect from (DD/MM/YY)

Please amend the address for: All my/our accounts  **OR** Just the following accounts (listed below)

#### Sterling Accounts

Account number	Sort code	Account number	Sort code	Account number	Sort code
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#### Mortgage Accounts

Account number	Account number	Account number
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#### Currency Accounts

Sort code	Sort code	Account number	Sort code	Account number	Sort code
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Credit/currency charge card number(s)

### Residential address

Mailing name

Address line 1

Address line 2

Address line 3

Address line 4 OR overseas country

Post code   Is the property a flat? Yes  No

Please confirm if you are: A homeowner  Renting  Living with parents  Other

Country of Residence  Applies to all parties? Yes  No   
If no, complete separate form for other party

**Correspondence address**

Please insert your correspondence address if different from your residential address

Address line 1

Address line 2

Address line 3

Address line 4 OR overseas country  Post code

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**3. Contact and personal details**– For joint account customers, please complete customer name above relevant boxes

Customer name 1

Are your contact details changing? Yes  No

If 'Yes', please ensure you capture all relevant up to date contact details. If any details need to be removed, please type "REMOVE" in the appropriate box.

Home telephone number

Mobile telephone number

Work telephone number

Email address

Country of Tax Residency	Tax reference number
<input type="text"/>	<input type="text"/>

**For joint account customers:**Amendments to customer contact details will only be completed if the form is signed by the relevant party.

Customer name 2

Are your contact details changing? Yes  No

If 'Yes', please ensure you capture all relevant up to date contact details. If any details need to be removed, please type "REMOVE" in the appropriate box.

Home telephone number

Mobile telephone number

Work telephone number

Email address

Country of Tax Residency

Tax reference number



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**4. Order New Card and Pin** - For customers who are eligible and wish to order a new card and/or a new pin, please complete the below

Order card to new address

Order Pin to new address

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**5. Confirmation** – to be signed in accordance with the bank account mandate/signing instructions.

Customer signature(s)

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Name (in full)

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Name (in full)

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Date (DD/MM/YY)

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Date (DD/MM/YY)

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**For Branch or Relationship Manager use only**

In all circumstances please complete the form in full and send on to Account Amendments. Scanned instructions may be sent to: ~ **CSC Amendments (RBSI, Jersey)**.

**Where the customer has NatWest credit cards, a photocopy of this form will be sent to:  
Customer Contact Centre, 2nd Floor, Credit Card Centre, Southend-on-Sea, Depot code 028.**

**Where the customer has a mortgage the form will be scanned and e-mailed to # IOM Mortgage Unit (RBSI, IOM)**

**Where the customer only holds Mortgage accounts, this form will be passed to ~ PBB CRM Processing.**

Is the customer relationship managed? Yes  No

Is the customer moving from a local to international address or vice versa?

I can confirm that I have checked Singleview for Caustic, IBBA and Lynx accounts.

Customer(s) hold accounts on: Caustic  IBBA  Lynx

I confirm the customer has been identified and the signature matches ISV.

**OR**

I confirm the customer has been identified. ISV is incomplete. Form IOM50077, Request to apply Customer Signature(s) to Bank Records, has been completed and is attached.

Staff signature

Staff name & ISV printed \_\_\_\_\_

Location \_\_\_\_\_

Contact number

Branch Stamp