

AMENDMENT FORM NON-PERSONAL ACCOUNTS

Member details

Member number: _____ Date: _____

Membership name: _____

Note: to change the number to sign or the membership mailing address ALL account holders or authorised account openers must sign the amendment form.

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 address details - Membership

New membership mailing address: _____

State: _____ Postcode: _____ Membership email address: _____

Change of address details - Non-personal party to membership

Non-personal party to whom the change relates

Entity name: _____

New business 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: _____

Which of the following does the change of address apply to (tick as appropriate):

☐ Principal Place of Business / Administration / Operation (Company, Sole Trader, Association)

☐ Registered Office (Company / Co-Operative) ☐ Address of the Trust

New contact details

Home: _____ Work: _____ Mobile: _____

Other: _____ Relationship: _____

Change of name details (only applicable for either a company, trust or incorporated association)

Full name of the non-personal party (write the full name as it currently appears on the membership)

Full name: _____

New name (write the new name in full as it will appear on the membership in the future)

New full name: _____

Write the ACN or registration number below as it appears on the change of name certificate:

ACN / registration no: _____

Evidence of change of name must be provided to, and retained by, Heritage. Before the change of name for a company or incorporated association is processed an original or certified copy of the 'change of name certificate' must be provided. For a trust to change name an updated trust deed showing a resolution by the trustee or settler that the trust name has changed must be provided.

Change of Business/Trading name details (only applicable for either Sole trader or Partnership)

Full name of the non-personal party (write the full name as it currently appears on the membership)

Full name: _____

New name (write the new name in full as it will appear on the membership in the future)

New full name: _____

Write the ABN below as it appears on the business name search:

ABN: _____

Evidence of change of name must be provided to, and retained by, Heritage. Before the change of name for a Sole trader or Partnership is processed a business name search is to be provided.

Personal changes for individual party to the membership

To change the personal details for an individual party to the membership (for example, an authorised signatory), complete an 'Amendment Form - Personal Accounts' for each individual party whose personal details have changed. If an individual has changed their name, complete the 'Personal Change of Name Form'.

Account holder / authorised account opener acknowledgement

I/We request Heritage to change my/our 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 entity 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 the new name.

Signature of Account Holder / Authorised Account Opener _____

Signature of Account Holder / Authorised Account Opener _____

BRANCH USE ONLY - This section MUST be completed for changes to LOAN ACCOUNTS

Are there any existing Personal Loans or Credit Cards attached to this member number?

☐ Yes ☐ No

Are there any existing Mortgage Loans or Line of Credit loans attached to this member number?

☐ Yes ☐ No

Have all new Visa cards, cheque books and debit cards been documented in branch diary for completion when name change completed?

☐ Yes ☐ No

Branches to note:

Visa cards/debit cards and cheque books are only to be ordered by the branch upon completion of name change on system

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.