

PERSONAL CHANGE OF NAME FORM

Member Details

Membership number/s _____ Date _____

Member name _____

NOTE: If you have any linked memberships please list these in the member number/s section.

Your Previous Details

Title _____ Surname _____

Given names _____

Old Signature _____

Your New Details

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

Title _____ Surname _____

Given names _____

Reason for name change Marriage Divorce Change of name certificate Correction

New Signature _____

Checklist – Evidence to Support Change of Name

Evidence of change of name must be provided to, and retained by, Heritage. Below is a listing of the **original or certified document** that must be provided for each reason to change a name on a membership. Please tick if provided:

- Marriage** – Marriage certificate showing the old name (as it currently appears on membership) and the new name (as it will appear on the membership in the future) and/or updated Primary Photo Identification showing the new name.
- Divorce** – Marriage certificate showing the old name (as it currently appears on membership) and the new name (as it will appear on the membership in the future) or Divorce papers, and/or updated Primary Photo Identification showing the new name.
- Change of name certificate** – issued by an Australian State or Territory Government Agency showing the old name (as it currently appears on the membership) and the new name (as it will appear on the membership in the future).
- Correction** – one piece of identification with either a photograph or signature which shows the correct spelling of the full name.

Account Holder / Authorised Account Opener Acknowledgement

I request Heritage to change my personal details to the new details recorded on this form under the membership number specified above. I declare that I am one and the same as the person with the full name above currently on Heritage's records and further acknowledge that any mortgages or other securities for loans under the relevant membership number will remain in force even though the land, vehicle or other property concerned may not be in my new name.

Signature of Party to whom the change relates to

Return Application

Mail to Heritage Bank
PO Box 190, Toowoomba QLD 4350

Email
info@heritage.com.au

Phone
Ph. 13 14 22

HBL use only

Have all Visa cards, Debit cards and cheque books been ordered by the staff member upon completion of name change on system

Yes No Branch use only _____

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.