

**Section 1: Customer Information**

PLEASE COMPLETE THIS SECTION IN ALL CASES

Title (Mr, Mrs, Miss, Dr etc.)	
Surname	
Forename(s)	
Other name(s) used now or previously	
Marital status	
Date of birth	
Place of birth (including town)	
Nationality / Domicile	
Passport / National Identity Number	
Principal residential address	
	Postcode
Length of residency at above address	
Owner / tenant / other e.g. with parents	
Home phone number	
Mobile number	
Email address	
Occupation / nature of employment	
Years in current employment	
Name and address of employer	
Details of the source of your wealth	
Details of income(s)	
<i>Please provide the following information regarding the assets being transferred or, if applicable, details of any third party transferor:</i>	
Name of remitting bank	
Address	
	Postcode
Account name	
Sort code	
Account number	
Value of assets being transferred	

**Section 2: Joint Accounts**

PLEASE ADDITIONALLY COMPLETE THIS SECTION IF APPLYING FOR A JOINT ACCOUNT

Title (Mr, Mrs, Miss, Dr etc.)	
Surname	
Forename(s)	
Other name(s) used now or previously	
Marital status	
Date of birth	
Place of birth (including town)	
Nationality / Domicile	
Passport / National Identity Number	
Principal residential address	
	Postcode
Length of residency at above address	
Owner / tenant / other e.g. with parents	
Home phone number	
Mobile number	
Email address	
Occupation / nature of employment	
Years in current employment	
Name and address of employer	
Single/Joint signatory	

IF MORE THAN TWO ACCOUNT HOLDERS, PLEASE COPY AND COMPLETE THIS PAGE

**Section 3: Tax Instructions**

- I/we understand that Vivier & Co is registered for the Approved Issuer Levy ('AIL') scheme in New Zealand. By paying a fee, withholding tax is not deducted in this country from my/our interest.
- I/we would like Vivier & Co to pay the AIL fee so that I/we have no tax deducted from my/our interest.
- Alternatively, I/we have ticked here [ ] to indicate that I/we wish to opt-out of the AIL scheme and accept a tax deduction at the rate of 15% on my/our interest.

**Section 4: Identification**

Please attach copies of the following for each account holder:

➤ A valid passport or national ID card
➤ A document evidencing your permanent address

Evidence of address can include the following (internet documents are not acceptable):

<b>Utility bills</b> <input type="checkbox"/> a gas, water, electricity, TV or landline (not mobile) phone bill (<3m) <input type="checkbox"/> a local authority bill (<12m) <b>Housing</b> <input type="checkbox"/> a current tenancy agreement <input type="checkbox"/> a current council rent book <input type="checkbox"/> a mortgage statement (<3m) <b>Insurance (&lt;12m)</b> <input type="checkbox"/> a motor or home insurance certificate	<b>Banking (&lt;3m)</b> <input type="checkbox"/> a bank statement <input type="checkbox"/> a credit card statement <b>Personal</b> <input type="checkbox"/> a pension book <input type="checkbox"/> a photocard driving licence <input type="checkbox"/> a health service card <b>Shopping (&lt;3m)</b> <input type="checkbox"/> a catalogue or mail order statement <input type="checkbox"/> a hire purchase statement of account
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**Section 5: Declaration**

- I/We have read and agree to be bound by Vivier & Co's terms and conditions.
- I/We certify that all information supplied by me/us in this application is correct and complete.
- I/We attach the following:
  - a copy current passport(s) or national ID card(s)
  - a copy proof of permanent address
  - details of any third party transferring the initial funds.

**I/We hereby confirm that the above information is correct** and that I/we own the assets which I/we intend to provide, free of prior claims or other impediments save as acknowledged in writing by you. I/We also consent to disclosure by Vivier & Co of any of my/our personal information to an associated company or to a third-party service provider in connection with the confidential operation and maintenance of accounts and services. Finally, I/we confirm that, where documents have been translated as a courtesy to customers, the English version shall always prevail.

AUTHORISED SIGNATORY	SIGNED	DATE