

**Section 1: Client 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	Please attach supporting documents
Details of income(s)	
Single/Joint signatory	
<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	
Details of the source of your wealth	Please attach supporting documents
Details of income(s)	
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; and
  - that, 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 in New Zealand from my/our interest; or
- We have ticked here [ ] to indicate that we wish to opt-out of the AIL scheme and accept a tax deduction at the standard rate on our interest.

**Section 4: Identification**

I/We attach the following documents for each account holder:

➤ a copy current passport(s) or national ID card(s)
➤ a copy proof of permanent address

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

Utility bills <ul style="list-style-type: none"> <li>○ a gas, water, electricity, TV or landline (not mobile) phone bill (&lt;3m)</li> <li>○ a local authority bill (&lt;12m)</li> </ul> Housing <ul style="list-style-type: none"> <li>○ a current tenancy agreement</li> <li>○ a current council rent book</li> <li>○ a mortgage statement (&lt;3m)</li> </ul> Insurance (<12m) <ul style="list-style-type: none"> <li>○ a motor or home insurance certificate</li> </ul>	Banking (<3m) <ul style="list-style-type: none"> <li>○ a bank statement</li> <li>○ a credit card statement</li> </ul> Personal <ul style="list-style-type: none"> <li>○ a pension book</li> <li>○ a photocard driving licence</li> <li>○ a health service card</li> </ul> Shopping (<3m) <ul style="list-style-type: none"> <li>○ a catalogue or mail order statement</li> <li>○ a hire purchase statement of account</li> </ul>
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**Section 5: Declaration**

I/we hereby confirm:

- that all information supplied by me in this application is correct and complete;
- that the assets which I/we intend to provide are wholly owned by me/us, free of prior claims or other impediments, save as acknowledged in writing by Vivier & Co;
- that I have read and agree to be bound by Vivier & Co's terms and conditions, in particular:
- that Vivier & Co may retain any of my information and disclose it to an associated company or to a third-party service provider in connection with the confidential operation and maintenance of accounts and services; and
- that, where documents have been translated as a courtesy to clients, the English version shall always prevail.

	Authorised Signatory 1	Authorised Signatory 2 (if any)
Signed		
Full name		
Date		