

An Authorised Representative Mandate allows one named person who is not an account holder to carry out transactions on your savings account on your behalf. This means they can make deposits and withdrawals without requiring your signature. This form can be used to register for one account only; if you want to register for another account you will need to complete a second form.

It is important to understand that this mandate limits the power of an authorised representative to carrying out **transactions** on your behalf, and they **cannot**:

- access any other account you hold;
- close the account;
- be provided with information about you or your accounts;
- make any decisions on your behalf;
- communicate to us any decisions that you have made; or
- request or take any action to change anything relating to your savings account.

If you need your authorised representative to have those powers (on your behalf, and as well as you still being able to operate the account yourself) you will need to provide us with an official **Power of Attorney**. This is a legal document that provides wider-ranging authority for a personal representative, and greater protections for you.

You can arrange a Lasting Power of Attorney (LPA) yourself or you can ask a solicitor to do it for you. You can get more information as follows:

- At the government website [gov.uk/power-of-attorney](https://www.gov.uk/power-of-attorney).
- By calling the Office of the Public Guardian on **0300 456 0300**.

If you do decide to arrange an LPA, the following page of our website tells you how to register it with us: [hrbs.co.uk/poa](https://www.hrbs.co.uk/poa).

How to register an authorised representative on your savings account

The form on page 2 must be fully completed, including the signatures of all account holders and the authorised representative.

We will carry out an electronic identity check for the authorised representative. This is a 'soft' search and does not appear on their credit history. In the rare event that ID documents are needed, we will contact them.

As an extra security measure we will contact you, the account holder, by telephone before registering this mandate on your account. Please make sure your contact information is correct to avoid any delays.

How long does the mandate last?

The mandate will be in place for 2 years, unless you enter a date on the form that is sooner. If the mandate is to be in place for 2 years, it will be reviewed at the end of the first year to check that you want it to continue. You can cancel the mandate at any time by instructing us in writing or by phone. The authorised representative can also give up their authority at any time by informing us in writing or by phone.

If any account holder loses mental capacity or dies while the mandate is in place, it will no longer be valid. This means the authorised representative loses their right to use their authority at that time.

Account details

Account holder(s):

Account number:

Home telephone:

Email address:

	Address:	
	Mobile tel:	
Email address:		

Authorised Representative details

Full name:

Date of birth:

Relationship to
account holder(s):

Occupation:

	Address:	
	Tel No.:	

I confirm that:

- I agree to hold this mandate as an authorised representative for this account.
- I understand that I am not authorised to make decisions about or changes to this account.
- I understand how Hinckley & Rugby will use my personal information (this is explained in our Privacy Policy, which you can read at hrbs.co.uk/privacy. You can also ask us to post it to you).
- I authorise my personal data to be used to make identification checks, including the use of information on the electoral register for the purpose of verifying my identity and the prevention of money laundering and fraud.

Signature of Authorised

Representative:

Date:

Confirmation of Authority – to be completed by the account holders

I give my authority for my authorised representative, whose name and signature appear above, to operate my account on my behalf (understanding that I also keep the right to operate the account myself), and allow Hinckley & Rugby to pay withdrawals from my account in line with the approximate weekly or monthly amount entered below, until I cancel this mandate or until the end date given below, whichever is sooner.

Mandate to automatically end after 2 years, with a review at the end of the first year:

OR Mandate to end on (date): _____

My reason for registering an authorised representative is: _____

The level of withdrawals by the authorised representative are likely to be **monthly/weekly** (delete one) amounts of about: £ _____ (Any additional information): _____

Signature(s):

Date:

* All account holders to sign

FOR OFFICE USE ONLY

Branch:

Input By:

Date:

Checked by:

Account holder signature(s) checked Contacted account holder prior to registration

Auth Rep Identification – Electronic pass / List 1 & 2 provided

Account flagged: PM3PTY Special Notes added Added to branch log Summary Privacy Notice provided to Auth Rep