



This form is used by Individual and Joint Account holders to update their contact details, bank account details and/or Authorised Representatives on their ANZ New Zealand Securities Limited (ANZ Securities) trading account(s).

By completing and returning this form, ANZ Securities will update your account details as specified by your request(s).

**SECTION 1. ACCOUNT INFORMATION UPDATE**

Account Name	Account Number
Account Name	Account Number
Account Name	Account Number

Previous Address Details:

**SECTION 2. CHANGE CONTACT DETAILS**

Please be advised that my/our contact details have changed effective from    2 0  and update your records to reflect the following amendment(s):

Residential Address, if this is unchanged please tick <input type="checkbox"/>	Postal Address (if different)
<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>

**Joint account holders:** Please indicate who the change of account details are for:

Home phone	Work phone
Mobile	Email

You do not need to provide proof of address if your address has changed. You only need to provide proof of address if you are adding a new Authorised Representative.

**IMPORTANT NOTE:** If your residential address, postal address and/or contact phone numbers are no longer based in New Zealand, you may need to complete additional paperwork. If this is the case, you will be contacted by ANZ Securities.

**SECTION 3. CHANGE BANK ACCOUNT DETAILS**

To change the nominated bank account on your account, you need to enclose a certified or verified copy of a bank encoded (bank printed) deposit slip, cheque or bank statement as verification.

I/we enclose certified or verified proof of the new bank account details – refer to Page 2.

**SECTION 4. CHANGE AUTHORISED REPRESENTATIVE**

Please amend/change/add or delete the following Authorised Representative (please circle appropriate option):

**FIRST AUTHORISED REPRESENTATIVE**

Please tick one:  Mr  Mrs  Miss  Ms  Other

First Name	Daytime phone
Middle Name(s)	Email
Surname	Relationship to customer

Will receive contract notes by email

I/we enclose certified or verified proof of legal name and date of birth for new Authorised Representatives – refer to Page 2.

I/we enclose certified or verified proof of the residential address for new Authorised Representatives – refer to Page 2.

Is the authorised representative a US resident for tax purposes?  No  Yes - refer to the "FAQs" page on the ANZ Securities website.

Is the authorised representative a US citizen?  No  Yes - refer to the "FAQs" page on the ANZ Securities website.

## Account Information Update Individual/Joint Account (cont)

### SECTION 5. SIGNATURE(S)

All parties to the account must sign this form to confirm and change the relevant account detail.

Name	
Signature	
Date:	<input type="text"/> <input type="text"/> 2 0 <input type="text"/>
Name	
Signature	
Date:	<input type="text"/> <input type="text"/> 2 0 <input type="text"/>
Name	
Signature	
Date:	<input type="text"/> <input type="text"/> 2 0 <input type="text"/>

- It is your responsibility to advise all Share Registries (for all NZ holdings and non-CHESS AUS holdings) of these changes in writing.
- Discrepancies between the registry records and ANZ Securities records will cause delays in settling transactions.
- CHESS Account Holders: As this is a broker sponsored account, it is our responsibility to advise your CHESS provider of these changes.

### PLEASE RETURN THIS FORM TO:

ANZ Securities, PO Box 1790, Wellington 6140  
applications@anzsecurities.co.nz  
Fax: 04 498 7064

### ACCEPTABLE FORMS OF IDENTIFICATION AND ADDRESS VERIFICATION

**Photo Identification** – Account Holders and Authorised Representatives must provide a certified or verified copy of one of the following: (*Photo ID must be current – we cannot accept expired photo ID*)

- Passport;
- New Zealand Firearms Licence;
- New Zealand Driver's Licence **AND** bank statement; or
- Another combination of identification as agreed to by ANZ Securities.

**Bank Account** – Account Holders must provide a certified or verified copy of one of the following:

- Bank statement (as delivered by mail, not via internet banking);
- A bank-generated deposit slip; or
- A cheque.

**Residential Address** – If you are adding a new Authorised Representative, you must provide an original or certified or verified copy of one of the following:

- Bank statement (as delivered by mail, not via internet banking);
- Utility or Rates Bill;
- IRD tax notice/certificate;
- Insurance policy document; or
- Another combination of identification as agreed to by ANZ Securities.

### CERTIFICATION OR VERIFICATION OF SUPPORTING DOCUMENTATION

- Certified or verified documents must be signed and include the name of the certifier or verifier, their occupation and the date.
- The certifier or verifier must state on each item, "I certify/verify this to be a true and accurate copy of the original document."
- The certifier or verifier must be at least 16 years of age and cannot be related to the person, the spouse or partner of the person or living at the same address as the person.
- The document being certified or verified and the signature of the certifier or verifier must not be dated more than three months before the date this application form was signed.

#### Acceptable certifiers are:

- Justice of the Peace;
- Lawyer (must be from a Financial Action Task Force (FATF) member country (including NZ));
- Chartered Accountant (must be member of CAANZ);
- A sworn employee of the NZ Police who holds the office of constable (any rank);
- Notary Public;
- New Zealand Honorary Consul;
- Member of Parliament; or
- Commonwealth Representative; includes Ambassador, High Commissioner, Commissioner, Minister, Counsellor, Charge d'Affaires, Head of Mission, Consular Officer, Pro-Consul, Trade Commissioner of a Commonwealth country.

#### Acceptable verifiers are:

- ANZ employees (where you attend an ANZ Bank New Zealand Limited branch in person with the original documentation).