

Heartland account application

Individuals

All accounts and services are provided by Heartland Bank Limited (**Heartland Bank**).

By completing and signing this application form, you acknowledge that you have read the relevant terms and conditions on www.heartland.co.nz, including:

- Heartland Bank Limited's current Account and Service General Terms and Conditions; and
- the Heartland Term Deposits Factsheet and Heartland Savings Account Fact Sheet (as applicable);

and agree they will be binding on you.

A copy of these documents and Heartland Bank's latest Disclosure Statement can be obtained at www.heartland.co.nz.

Individual **Joint** **Child (under 16)** **Other** (please specify) _____

Please state why you are opening this account and how you intend to fund it: _____

Primary account holder (overseas residents must provide a physical overseas address)

Existing customer – customer number _____ Occupation _____

Mr Mrs Miss Ms Other _____ Date of birth _____

First name(s) in full _____ Preferred name _____

Surname _____ Country of birth _____

If your country of birth, citizenship, residency and tax residency are all NZ, please tick and move to the next section.

Countries you have residency or citizenship _____

Countries you are tax resident in _____

(If any overseas tax residencies, a self-certification form must be completed)

Tax details

Tax Identification number									

NZ IRD number

or country of tax residency _____

NZ residents, please indicate your choice of RWT rate below. If exempt, please provide an exemption certificate.

10.5% 17.5% 30.0% 33.0% 39.0% 28.0% (company) Exempt

Non-residents, please specify:

NRWT AIL

Additional tax identification number									

Additional country of tax residency _____

Contact details

Postal address _____

Suburb _____ City or town _____ Post code _____

Physical address (if different from above) _____

Suburb _____ City or town _____ Post code _____

Email _____

(Please note, by providing an email address, you consent to receiving communications in electronic form)

Ph (hm) _____ Ph (wk) _____ Mob _____

How did you hear about us?

- Online/digital/social media (please specify) _____
- Radio Newspaper (please specify) _____ Club or event
- Heartland office Word of mouth Other (please specify) _____

Further information (if you have any additional comments or further information, please add it here)

Privacy

In this declaration, “Heartland”, “we” or “us” means Heartland Bank Limited, and its related entities, successors, assigns, agents and associates, and “you” means the person completing this application and each other person named in this application. Heartland is collecting information about you in accordance with the Privacy Act 2020 and our Privacy Statement, and we may not be able to provide you with products or services if you do not provide that information. That information may be used by us to consider this application for an account or service, including to establish and verify your identity and to assess your creditworthiness and financial position from time to time, and any future application for products or services which involves you. We can also use it to administer and monitor products or services provided to you, to comply with legal and regulatory requirements (e.g. identity verification requirements and tax reporting), to provide you with information about other products or services, including those of selected third parties, generally to develop and run our business, and as otherwise described in our Privacy Statement. You agree that – for those purposes – we can provide information about you to, and obtain information about you from, other organisations or people we consider appropriate. Those organisations might include our service providers, other financial and insurance institutions, government departments, your employer or accountant, third parties for the purposes of fraud prevention, identity verification, and any other purpose relevant to those purposes (those third parties may retain information and use it for identity verification and fraud detection purposes), and other appropriate persons. We may also exchange information about you (including default information) with credit reporting agencies on an ongoing basis. Those agencies may retain that information and provide it to other customers who use their credit reporting services. You have rights to access and request correction of your personal information under the Privacy Act 2020. You can do so by contacting us using the details provided on heartland.co.nz/contact-us.

By proceeding, you confirm that:

- each person named in this application form has read and agrees to the terms above;
- all information provided to us is correct, complete and not misleading; and
- none of those people is an un-discharged bankrupt.

Signed by the primary account holder or on behalf of

Name _____

Signature _____

Date _____

Signed by the joint account holder or on behalf of

Name _____

Signature _____

Date _____