



IMB Ltd trading as IMB Bank
ABN 92 087 651 974
AFSL/Australian Credit Licence 237 391
PO Box 2077
Wollongong NSW 2500
133 462 imb.com.au

Business Member Statement Preference & Access Form

IMPORTANT INFORMATION

Use this form to provide the method that you wish to receive your statements and, if you wish, to provide your chosen ATO's with the ability to view the Business eStatement in Internet Banking. Authority to Operate (ATO) means a person who has authority to operate on a Business' account(s).

The statement preference also applies to notices that we are required to give the Business. These notices may include things such as changes to the terms and conditions relating to the Business' account(s), fees and charges, and the repayments on any loans that you may have with us.

You can change your Statement Preference or who has View eStatement access at any time by completing this form.

It is the Business' responsibility to:

- keep their Business email address up to date
- ensure that ATOs view the Business' eStatement promptly and notify us of any issues
- promptly advise us of any changes to who is to have authority to view the Business' eStatement in Internet Banking.

An ATO with View eStatement access on your Business' account(s) will be able to view:

- the entire eStatement for the Business Member containing all the Business' accounts (including account(s) that the ATO is not authorised to transact on)
- all of the Business member's eStatements that are available in Internet Banking, (including previous statements which could be accessible for a period of up to 7 years from the statement date).

ATOs must be registered for Internet Banking to be given View eStatement access.

Delegated Users cannot be given View eStatement access.

MEMBER DETAILS

IMB Bank Member Number:	
Full Legal Name of Member:	

STATEMENT PREFERENCE

☐ **Online** **Business Email Address:** _____

If **Online** is selected for your preference:

- we'll send an email to the email address nominated above to let the Business know when a new eStatement is ready for viewing by an ATO in Internet Banking (at least 1 ATO must have View eStatement access)
- we may include notices that we are required to give the Business and we will tell you when we do this. Alternatively, we may send an email to the Business including these notices or advising that they are available in Internet Banking or on www.imb.com.au
- the Business will no longer receive paper statements or notices (unless we decide to send these to you in certain circumstances)
- the Business' email should be regularly checked for emails from us and we should be notified promptly if the Business changes its email address
- this preference applies to all accounts the Business has with us now and in the future, including loan and deposit accounts (unless the preference is changed)
- the Business can change its preference to receiving paper statements and notices at any time by completing a new form. The Form can be requested by phoning us on 133 462, calling into your local branch, or printed from imb.com.au.

☐ **Paper**

If **Paper** is selected for your preference:

- A paper statement will be sent to the Business' Correspondence Address
- ATOs can also be granted View eStatement access which allows the ATO to access eStatements through Internet Banking and a paper statement will continue to be sent to the Business.

Please return the completed form to a Branch or post to: Attention Solution Services IMB Ltd, PO Box 2077 Wollongong NSW 2500, or email to Solution.Services@imb.com.au

WHO CAN VIEW THE ESTATEMENT IN INTERNET BANKING

Provide details of **all** the Internet Banking registered ATOs who you authorise to view the Business' entire eStatement in Internet Banking. **Note:** This list replaces all previous access nominations.

Given Names

Surname

Provide Member Number OR Address

Given Names

Surname

Provide Member Number OR Address

Given Names

Surname

Provide Member Number OR Address

Given Names

Surname

Provide Member Number OR Address

Given Names

Surname

Provide Member Number OR Address

☐

Please tick if there are **more than 5** ATOs to have View Access and attach an additional Business Member Statement Preference and Access Form.

SIGNED BY AUTHORISED REPRESENTATIVE(S) see signing instructions below

Signature: _____

Position / office held: _____

Name: _____

Date: ____/____/____

Signature: _____

Position / office held: _____

Name: _____

Date: ____/____/____

Signature: _____

Position / office held: _____

Name: _____

Date: ____/____/____

Signature: _____

Position / office held: _____

Name: _____

Date: ____/____/____

SIGNING INSTRUCTIONS

Trust	All Trustees OR 2 Trustees and minutes/written evidence* of the entity confirming authority to make the amendments sought OR 2 Directors / 1 Director and 1 Secretary / Sole Director and Secretary for a Company Trustee
Company	2 Directors OR 1 Director and Secretary OR Sole Director and Secretary
Sole Trader	Proprietor of the business
Partnership	All partners OR 2 partners and minutes/written evidence* of the entity confirming authority to make the amendments sought
Unincorporated Association	All office holders OR 2 officers holders and minutes/written evidence* of the entity confirming authority to make the amendments sought
Incorporated Association	All office holders OR 2 officers holders and minutes/written evidence* of the entity confirming authority to make the amendments sought
Government Entity	Authorised officers with written evidence* of authority to make the amendments sought

*Where minutes of meeting or letter on letterhead are provided as evidence they must be signed by at least one other office holder/ partner and include:

- full name of the authorised individual officer holders/partners
- authorise the individual office holders/partners to make the amendment
- date

OFFICE USE ONLY

Branch Details:

Branch/Dept: _____

Staff member: _____

Emailed To H/O For:

☐ Record keeping
(With FACTS IMB Copy)

Verification Details:

☐ Authorised Representative/s Verified
☐ Loaded in FACTS
☐ FACTS Member Copy form provided to Member
Minutes of meeting (re: signing) attached? ☐ Yes ☐ No, not required