



NAB Connect

Application form

Use this form to apply for NAB Connect (online business banking) and appoint a delegate to set it up for your business.

Find out more about NAB Connect

www.nab.com.au/business/online-banking/nab-connect

Before you begin

- ▶ Please have your business details ready (including your NAB business transaction account details)
- ▶ You will also need your delegate's details (including a suitable contact time)
- ▶ Please ensure you have read and agree with the **NAB Digital Business Channels Terms and Conditions**
- ▶ Please ensure you have read and agree with the **NAB Connect Fees and Charges Schedule**

Note: Unless indicated otherwise, any defined terms in the NAB Digital Business Channels Terms and Conditions have the same meaning in this Application Form.

How to complete this form

- ▶ Complete **Sections A – D**
 - **Section A** – Customer Information
 - **Section B** – Electronic Consent
 - **Section C** – NAB Connect profile – delegation to Your Nominated Authority
 - **Section D** – Customer Declaration and Execution
- ▶ If you would like to add other Products (accounts, cards or merchant facilities) to NAB Connect, also complete **Section E Add Other Accounts** (multiple signatures required)
- ▶ Email a scanned version of the completed form to nabconnect.onboarding@nab.com.au (all pages of this form must be returned)



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Please complete Application form in full in black or blue pen using CAPITAL LETTERS and **X** where appropriate.

Section A Customer Information

Customer (“You”, “Your” or “Applicant”)

Full legal name of the business your NAB Connect is to be established under (including details of any trust, if acting as trustee)

ABN, ACN or ARBN

NAB Business transaction account details

For security and identification purposes, please list a NAB Business transaction account that is in the business name provided above.

BSB number

Account number

Postal address

Level/office number or PO box

Street number

Street name

Suburb

State

Postcode

Country



This address will **only** be updated in NAB Connect. New/Replacement Physical Tokens will be posted here.

Section B Electronic Consent

By selecting Yes below, You elect to receive electronic notices for important information (including changes to terms and conditions) and/or statement notifications from National Australia Bank Limited (NAB) via email or the NAB Channel. This will apply to all eligible* Products, Services and Specialised Services registered to your NAB Connect site.

This means You agree that, NAB is taken to have provided this important information to You by either:

1. sending an email with the important information to the email addresses You have provided for this purpose; or
2. notifying You that the important information is available for retrieval by You in the NAB Connect Channel.

I elect to receive information relating to NAB Connect electronically via the NAB Connect Channel or email.

Yes No

I elect to receive statement notifications electronically via email for all eligible Products, Services and Specialised Services registered to my NAB Connect site and I agree that NAB will cease to mail any paper statements for these eligible accounts.

Yes No

*This does not include Products, Services and Specialised Services where only paper statements are available.

Email Addresses

You must provide at least one email address if you elected yes for either of the above.

Email address

Email address

Email address

Email address

Please Keep in Mind

These email addresses should be checked regularly. Changes to these email addresses can be requested via a NAB Connect Amendment form or an Administrator can send us a Secure Message via the NAB Connect Channel.

Failure to update these email addresses may mean important information about NAB Connect and your Statement Notifications is missed. If we are unable to send your statement notifications we will resume sending you paper statements.



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Section C NAB Connect profile – delegation to Your Nominated Authority

Your Nominated Authority

Your “Nominated Authority” is the person You appoint and authorise using this form to provide us with the directions and details necessary to establish Your NAB Connect profile, including all of the matters described in the Additional Information at page 8 under “What You authorise Your Nominated Authority to do to establish your NAB Connect profile”.

In summary this includes providing the directions and details necessary to establish your NAB Connect profile including:

- ✓ Products, Services and Specialised Services to be Accessed through NAB Connect
- ✓ Payment Authorisation Rules
- ✓ Nominations of users - refer NAB Connect Help - User Types
- ✓ Payment limits
- ✓ Access profile & permissions levels
- ✓ Billing account
- ✓ Direct Entry User IDs
- ✓ Nomination of Administrators



These are important authorisations. Please carefully review the Additional Information on page 8 before completing this form. Depending on Your Direct Entry User ID requirements, we may need You to complete an additional form.

Your payments and security

We take your online security very seriously. NAB Connect includes a number of security features to help protect you including:

1. **Segregation of Duties** (a requirement that the person who authorises a payment must have a different User ID to the person who created that payment).
2. **Payment Authorisation Rules** (which require at least two people to provide authorisation prior to a payment being processed).
3. **Dual Admin for Online Amendments** (ensures that any two Administrators are required to make online amendments).

We strongly recommend that You instruct Your Nominated Authority to activate the security measures above when speaking to our NAB Connect Specialist.



Should you wish to enable any of the above payment and security features, please ensure Your Nominated Authority selects this option when speaking to our NAB Connect Specialist.

Details of your Nominated Authority

Enter the details of the person You appoint and authorise as Your Nominated Authority to speak to NAB about the setup of NAB Connect.

| Title | First name | Middle name | Last name |
|----------------------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Work phone (including area code) | Mobile phone | Work email address | |
| () <input type="text"/> | <input type="text"/> | <input type="text"/> | |



Once Your Nominated Authority has completed all details necessary to establish Your NAB Connect profile, we'll email you a document summarising the selections made by your Nominated Authority. It's important that you review this summary carefully when received to ensure that all selections match your intentions. If you wish to make any changes please reply back to the e-mail or call us on **1300 888 413**.



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Section D Customer Declaration and Execution

Each signatory identified below confirms that they are authorised to complete this NAB Connect Application Form and acknowledges and agrees to the following:

1. The Applicant acknowledges it has been provided with the opportunity to view and confirms that each signatory has read and agrees to:
 - the NAB Digital Business Channels Terms and Conditions (nab.com.au/nabconnecttermsandconditions); and
 - the Fees and Charges Schedule (www.nab.com.au/business/interest-rates-fees-and-charges) and any other Schedules (as defined in the NAB Digital Business Channels Terms and Conditions (nab.com.au/nabconnecttermsandconditions)).

The Applicant agrees to be bound by the NAB Connect Material referred to above ("NAB Connect Material"). The Applicant acknowledges it has had the opportunity to retain the NAB Connect Material (e.g. by printing or saving it) and that it will not be separately provided with a copy of the NAB Connect Material unless it makes a specific request for it.

2. The Applicant acknowledges that (a) failing to activate Segregation of Duties; and/or (b) establishing its NAB Connect facility with only a single authoriser, will expose it to a higher level of internal and external fraud risk than activating Segregation of Duties and nominating Payment Authorisation Rules that require multiple authorisations.
3. The Applicant has reviewed and acknowledges and agrees to each of the additional matters set out in the Additional Information, including the additional matters under "Things you need to understand and agree to when you apply".

Details of the signatories

Note: If You are a company, this form must be signed in accordance with Section 127(1) of the Corporations Act 2001 by either two directors or a director and secretary unless You are a company with a sole director who is also the sole secretary in which case it must be signed by that sole director. If You are a different type of organisation (such as a partnership or association), this form must be signed in accordance with Your governing documents.

This form must be dated. Forms dated more than 3 months in the past may not be accepted.

| | | |
|--------------------------------|----------------------------------|-----------------------------|
| Name | Date | Title (Director, Secretary) |
| <input type="text"/> | <input type="text" value="/ /"/> | <input type="text"/> |
| Signature | Email address | |
| <input type="text" value="X"/> | <input type="text"/> | |

| | | |
|--------------------------------|----------------------------------|-----------------------------|
| Name | Date | Title (Director, Secretary) |
| <input type="text"/> | <input type="text" value="/ /"/> | <input type="text"/> |
| Signature | Email address | |
| <input type="text" value="X"/> | <input type="text"/> | |

You may have other Products in a different name to your business name listed in Section A (such as personal accounts or other business accounts). If you wish to add these to NAB Connect please complete Section E below.

NAB Use Only - Business banking representative to complete.

I confirm the above signatories and any appearing in Section E match the authority for the entity/s.

| | | |
|----------------------|----------------------|----------------------------------|
| Full Name | Employee Number | Date |
| <input type="text"/> | <input type="text"/> | <input type="text" value="/ /"/> |



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Section E Add other Accounts

Use this section if you wish to link other **Products** in a different name to the business name listed in Section A (Customer).



The owner of the Products identified below (**Account Owner**) must review and sign this section of the form. The Customer will have all of the same Access rights as the Account Owner.

In this section you can nominate:

- A particular Product to add to the NAB Connect Customer profile listed in Section A (complete 'Add account' section/s); or
- **All existing and future** Products to add to the NAB Connect Customer profile listed in Section A (select 'Relate this Entity').

The Account Owner authorises NAB to give the Customer Access to the Products through the Customer's NAB Connect profile.

Each Account Owner authorises NAB to act on instructions from the Customer (their Administrators and Users) in relation to the Account Owner's Products, including any instructions in relation to:

- (a) the selection of Users authorised to view and transact on the accounts through NAB Connect;
- (b) Payment Authorisation Rules including the number of Users required to make a payment;
- (c) the Services that can be used in connection with the Products through NAB Connect; and
- (d) making payments from the Products; cancelling payment instructions; debiting the accounts with the value of any payments made (this includes making payments and causing debits which overdraw the account, whether or not there is a pre-arranged overdraft facility) and any incurred fees, charges and interest (including for overdrawing or for currency conversion and whether charged by NAB or another bank involved in the payment).

Administrators of the Customer are able to add or remove Access to all first-party Products owned by the Customer and all Products made accessible by the Account Owner – we strongly recommend reading what an Administrator can do in NAB Connect in the NAB Digital Business Channels Terms and Conditions (nab.com.au/nabconnecttermsandconditions).

Notwithstanding we recommend that the Customer enables Segregation of Duties, Dual Admin and Payment Authorisation Rules that requires multiple authorisations prior to processing payments, the Customer may not have applied these rules – see page 8 to learn more about relevant security features.

Access and use of each account through NAB Connect is subject to the NAB Digital Business Channels Terms and Conditions. The Customer determines the account to be debited for all NAB Connect fees and charges, which could be a linked account. The Account Owner acknowledges they have been provided with the opportunity to view and retain (e.g. by printing and saving it), and each signatory has read and agrees to:

- the NAB Digital Business Channels Terms and Conditions (nab.com.au/nabconnecttermsandconditions); and
- the Fees and Charges Schedule (www.nab.com.au/business/interest-rates-fees-and-charges) and any other Schedules.

Online Statements If the Customer has elected to receive their statements online, all statements for any linked Products will also be made available online (via NAB Connect) for the Customer to view. The Account Owner acknowledges they have an online channel in order for you to be able to view their statement. NAB will not mail the Account Owner out an additional paper statement. If the Account Owner wants to receive paper statements for a particular Product, please do not link that Product to the Customer's NAB Connect facility.

The Account Owner can request to remove any Product(s) from the Customer's NAB Connect online banking facility at any time by:

- (a) emailing a letter signed by the Account Owner seeking removal of the Product/entity to nabconnect.onboarding@nab.com.au; or
- (b) speaking with the Account Owner's business banking representative who will email nabconnect.onboarding@nab.com.au

Note: If the Account Owner is a company, Section E must be signed in accordance with Section 127(1) of the Corporations Act 2001 by either two directors or a director and secretary unless You are a company with a sole director who is also the sole secretary in which case it must be signed by that sole director. If the Account Owner is a different type of organisation (such as a partnership or association), this form must be signed in accordance with Your governing documents.

This form must be dated. Forms dated more than 3 months in the past may not be accepted.



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Section E Add other Accounts (continued)

Please note: We will assign all newly added accounts to all users and all eligible Services unless you tick the box below.

Call my Business Contact to discuss the Access required.

Add Account – Please note: We will add the single account specified unless you tick the box below.

Relate this Entity (All existing and future Products in the Related Entity's name will be automatically linked without notification)

| | | | |
|----------------------|-------------------------------|----------------------|-----------------------------|
| BSB Number | Account Number or Card Number | Account Legal Name | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name | Title (Director, Secretary) | Name | Title (Director, Secretary) |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Signature | Date | Signature | Date |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Add Account – Please note: We will add the single account specified unless you tick the box below.

Relate this Entity (All existing and future Products in the Related Entity's name will be automatically linked without notification)

| | | | |
|----------------------|-------------------------------|----------------------|-----------------------------|
| BSB Number | Account Number or Card Number | Account Legal Name | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name | Title (Director, Secretary) | Name | Title (Director, Secretary) |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Signature | Date | Signature | Date |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Add Account – Please note: We will add the single account specified unless you tick the box below.

Relate this Entity (All existing and future Products in the Related Entity's name will be automatically linked without notification)

| | | | |
|----------------------|-------------------------------|----------------------|-----------------------------|
| BSB Number | Account Number or Card Number | Account Legal Name | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name | Title (Director, Secretary) | Name | Title (Director, Secretary) |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Signature | Date | Signature | Date |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Add Account – Please note: We will add the single account specified unless you tick the box below.

Relate this Entity (All existing and future Products in the Related Entity's name will be automatically linked without notification)

| | | | |
|----------------------|-------------------------------|----------------------|-----------------------------|
| BSB Number | Account Number or Card Number | Account Legal Name | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name | Title (Director, Secretary) | Name | Title (Director, Secretary) |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Signature | Date | Signature | Date |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |



NEED MORE? Feel free to re-print this page for multiple accounts to ensure they all get added



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NAB Connect Application Form

Additional Information

Want to know more about what you are agreeing to and authorising in this application, you've come to the right place.

What's included

This section includes important information on:

- ▶ What you authorise your Nominated Authority to do to establish your NAB Connect profile
- ▶ Things you need to understand and agree to when you apply



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Additional Information

What You authorise Your Nominated Authority to do to establish Your NAB Connect profile

You appoint and authorise Your Nominated Authority identified in Section C of this NAB Connect Application Form to provide us with all directions and details necessary to establish Your NAB Connect profile, including in relation to the following:

1. Products – list of the NAB business accounts and credit cards that are in Your name that You wish to Access through NAB Connect.
2. List of Services that You wish to Access through NAB Connect and which Products You wish these services to apply to.
3. The Direct Entry User IDs to be used with Your nominated Direct Entry services (if applicable).
4. Nomination of Users (e.g. persons who will be able to Access Your NAB Connect service and perform certain activities and receive certain information on Your behalf).
5. Completion of Access Profile and permission levels for each User. The Access Profile and permission levels establish which services and accounts a User can Access and what functions a User is authorised to perform (e.g. create a payment, authorise a payment, etc.).
6. Establishment of Payment Authorisation Rules, consisting of the following:
 - Selecting whether Segregation of Duties applies. Your NAB Connect service can be set up to require that the person who authorises a payment must have a different User ID to the person who created the payment.
 - A Payment Value Range within which Your nominated Authorising Users are allowed to authorise payments.
 - The Number of Authorising Users required to authorise a payment within a Payment Value Range.
 - The Number of Authorising Users required to authorise a payment within a Payment Value Range.



NAB Connect gives You the ability to establish Payment Authorisation Rules and Segregation of Duties to suit Your business and risk profile. We strongly recommend that You set up all payments to be authorised by at least two people.

7. Payment Limits – nomination of which Authorising Users You want to be responsible for setting these limits, and which You want to be responsible for approving payments that breach these limits.
8. Billing Account – nomination of the account to be debited for all NAB Connect and Service fees and charges.
9. Nomination of Administrators. We strongly recommend reading what an Administrator can do in NAB Connect in the NAB Digital Business Channels Terms and Conditions (nab.com.au/nabconnecttermsandconditions).

Note: We will advise your Administrators of new services and functionality introduced to NAB Connect and NAB will add, remove or change Access to services and/or accounts where necessary to ensure new functionality is readily available.



In addition, Your NAB Connect Welcome Email and Mobile Token Activation Email (where applicable) will be sent directly to Nominated Authorising Users, whereas Physical Security Tokens for all Authorising Users will be sent to Your nominated Administrator.



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Additional Information

What You authorise Your Nominated Authority to do to establish Your NAB Connect profile

Each signatory who is identified in Section E of this NAB Connect Application Form acknowledges and agrees the following matters for and on behalf of the Applicant identified in Section A:

Note: Any information you provide is collected in accordance with NAB's Privacy Policy
– See here <https://www.nab.com.au/common/privacy-policy/privacy-notification> for full details.

1. The Customer declares that where personal information about an individual (such as a User or contact person) has been or will be provided to NAB (including in this consent form or in connection with the Customer's ongoing use of NAB Connect), whether connected with the Customer or a Related Entity, Customer has made or will make each such individual aware:
 - that NAB has collected their information to manage and administer NAB Connect,
 - that their personal information may be disclosed to other organisations involved in the management or administration of NAB Connect, including some organisations outside of Australia,
 - that they can refer to NAB's Privacy Notification at www.nab.com.au/privacynotification and Privacy Policy at www.nab.com.au/privacy for more information about NAB's personal information handling practices, including how they can Access or correct their information or lodge a complaint.
 - Copies of these privacy documents may also be requested by contacting NAB on 13 22 65.
2. The Applicant acknowledges that any use of the NAB Connect Channel and the Services to Access or attempt to Access accounts is also subject to the terms and conditions which apply to those accounts. See the paramouncy provisions in the NAB Connect Material and the NAB Invoice Finance Facility Agreement, if applicable, for the order of precedence when interpreting those terms and conditions.
3. The Applicant appoints and authorises each other person named by the Applicant's Nominated Authority when completing the NAB Connect Profile:
 - as an Administrator to perform stipulated aspects of that role on behalf of the Applicant; and
 - as a user, to use NAB Connect in relation to the Products, Services and Specialised Services as set out in this Application Form (and any Additions/Amendments Request Form).
4. Subject to the NAB Digital Business Channels Terms and Conditions, the Applicant acknowledges that National Australia Bank Limited may assume that any person who uses an Authorisation Method issued to a user to use NAB Connect is properly authorised to so use NAB Connect on behalf of the Applicant.
5. By ticking the 'Yes' box in Section A of this NAB Connect Application Form under 'Receipt of electronic notices', the Applicant elects to receive important information (including changes to the disclosure documents and terms and conditions for a Service) from National Australia Bank Limited by email or by having to retrieve it from the NAB Connect Channel instead of being sent it in paper form (e.g. mail or fax).

The Applicant agrees National Australia Bank Limited is taken to have provided this important information to the Applicant by making it available for retrieval in the NAB Connect Channel. The Applicant acknowledges that NAB will provide a notice in the Channel when an Applicant's User logs on that the important information is available for retrieval from the Channel.



WHAT NEXT?

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