



Internet Banking and Telephone Banking Authorised User Nomination

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

Complete this form to increase daily transfer limits (Internet Banking Only) or to set up access and rights to accounts via Telephone Banking and Internet Banking only.

This form can be used by account holders and third parties. To set up access for more than one person, repeat section three for each person who requires access.

Number of authorised users

Note: Please type in the Number of authorised users to ensure the form prints/provides the relevant number of pages for input.

Section 1 Account holder(s)

Section 1a Companies and organisations

Note: Complete one Authorised User Nomination Form per entity.

Company/Business Name

ABN/ACN

Or

Section 1b Individual/joint account holders

Surname

Given Names

Surname

Given Names

Surname

Given Names

Surname

Given Names

Section 2 Nominated accounts

Number of Nominated Accounts

Nominate account specific Internet Banking Payment Approval.
No means any user with debit access can perform IB payments alone.
Yes enables up to 2 users to approve IB payments.

	Account name	Account number	<input type="checkbox"/> No, or <input type="checkbox"/> Yes	If yes, <input type="checkbox"/> Any 1, or <input type="checkbox"/> Any 2 to approve
1	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No, or <input type="checkbox"/> Yes	If yes, <input type="checkbox"/> Any 1, or <input type="checkbox"/> Any 2 to approve
2	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No, or <input type="checkbox"/> Yes	If yes, <input type="checkbox"/> Any 1, or <input type="checkbox"/> Any 2 to approve
3	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No, or <input type="checkbox"/> Yes	If yes, <input type="checkbox"/> Any 1, or <input type="checkbox"/> Any 2 to approve
4	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No, or <input type="checkbox"/> Yes	If yes, <input type="checkbox"/> Any 1, or <input type="checkbox"/> Any 2 to approve

Internet Banking Payment Approval allows Any 1 or Any 2 people to approve payments from your nominated NAB Accounts on Internet Banking. In this section, nominate the Internet Banking Payment Approval at account level. If you select Any 1, then all payments from the nominated account will require the approval of any 1 approver. If you select Any 2, then all payments will require the approval of any 2 approvers. In Section 3c nominate user specific access, which includes "Create Only" or "Create & Approve" access.

Section 3 Authorised users - complete section 3a to 3e for each person being granted access

Section 3a Authorised user's name and NAB ID

Surname

Given Names

Create new NAB ID, or Use an existing NAB ID

Warning: If you use an existing NAB ID:

- the holder of that NAB ID can transfer any available funds between those accounts and any other accounts linked to that NAB ID now or in the future including other 3rd party accounts (unless 'enquiry only' access is granted).

- the Pay Anyone daily limits which apply to that NAB ID from time to time will apply to your linked accounts. If you want a different Pay Anyone limit, you should consider whether a new NAB ID should be established for that authorised user.

NAB ID (Banker to complete)

Customer number

Section 3b Authorised user's internet banking and telephone banking options and limits - Banker to complete

This section must be completed for a new NAB ID or if you are changing an existing NAB ID.

Pay Anyone Daily Limits

Domestic Transfer Daily Limit (SMS security required for limits of \$5,000 or more)
Allows transfer of funds to accounts at any Australian financial institution

- \$2,500 \$5,000 \$10,000 \$15,000 \$20,000
 \$40,000 \$60,000 \$80,000 \$100,000 Disable Pay Anyone

International Transfer Daily Limit (SMS Security required for all international limits)
Allows transfer of funds overseas

- \$1,000 \$3,000 \$5,000 \$10,000 \$15,000
 \$20,000 \$50,000 \$100,000 \$150,000 \$200,000
 \$250,000 \$300,000 Disable Pay Anyone

A pay anyone daily limit must be nominated for the payment creator as this limit is checked upon final payment approval, not the limit of the payment approver.

SMS Security

Allows Pay Anyone limits (of \$5,000 or more for domestic limits and all international limits) and the ability to view and amend customer contact details.

- Enable SMS Security, or Disable SMS Security

Mobile number for SMS Security

Telephone Banking

Operated Assisted

- Can update, or
 Can't update

Self service

- Enquiry only, or
 Transaction access

Section 3c Authorised user's account access

Place a tick in each box to select access required.

Account number	Telephone Banking		Internet Banking			Internet Banking Payment Approval
	or		or			
_____	<input type="checkbox"/> No access	<input type="checkbox"/> Debit	<input type="checkbox"/> No access	<input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve
_____	<input type="checkbox"/> Credit	<input type="checkbox"/> Redraw	<input type="checkbox"/> No access	<input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve
_____	<input type="checkbox"/> No access	<input type="checkbox"/> Debit	<input type="checkbox"/> No access	<input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve
_____	<input type="checkbox"/> Credit	<input type="checkbox"/> Redraw	<input type="checkbox"/> No access	<input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve

Redraw option will only be available if applicable and enabled on your loan account, and it is not available on accounts with IB Payment Approval.

Debit access must be ticked for Create Only and Create & Approve roles if Payment Approval is enabled for an account in Section 2.

Section 3d Authorised user's acknowledgement

I agree to the account access given to me in this form.

I acknowledge that NAB collects the information about me in this form for the purpose of processing this request to provide me with access to the Nominated Accounts on the terms set out above. If this information is not provided to NAB, NAB cannot process that request. You can gain access to your personal information, subject to some exceptions allowed by law. Contact NAB on 13 22 65 or at nab.com.au to get a form requesting access.

Authorised User's Signature

x _____

Date

____ / ____ / ____

Section 3e Third party acknowledgement

Was the NAB ID in Section 3a issued to different Account Holder(s) than the Account Holder(s) in Section 1?

- Yes - The Account Holder(s) issued with the NAB ID in Section 3a must sign this section. For NAB IDs issued under a company/organisation it should be signed by all account holders/owners
 No - this section can be left blank.

I/We acknowledge that I/we have read the Warning set out in Section 3a, and agree that the additional NAB ID issued to me/us can be used to access the Nominated Accounts as set out in this form.

Company/Business Name (if applicable)

ABN/ACN (if applicable)

Name & Title of Third Party

Third Party's Signature

x _____

Date

____ / ____ / ____

Name & Title of Third Party

Third Party's Signature

x _____

Date

____ / ____ / ____

Name & Title of Third Party

Third Party's Signature

x _____

Date

____ / ____ / ____

Name & Title of Third Party

Third Party's Signature

x _____

Date

____ / ____ / ____

Section 3 Authorised users - complete section 3a to 3e for each person being granted access

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	or	or		
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<input type="text"/>	<input type="checkbox"/> No access <input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> No access <input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve
<input type="text"/>	<input type="checkbox"/> No access <input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> No access <input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve
<input type="text"/>	<input type="checkbox"/> No access <input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> No access <input type="checkbox"/> Online Statement	<input type="checkbox"/> Debit <input type="checkbox"/> Credit <input type="checkbox"/> Redraw	<input type="checkbox"/> Create Only <input type="checkbox"/> Create & Approve

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Authorised User's Signature

X

Date

/ /

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- No - this section can be left blank.

I/We acknowledge that I/we have read the Warning set out in Section 3a, and agree that the additional NAB ID issued to me/us can be used to access the Nominated Accounts as set out in this form.

Company/Business Name (if applicable)	ABN/ACN (if applicable)
<input type="text"/>	<input type="text"/>

Name & Title of Third Party	Third Party's Signature	Date
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>

Section 4 Account holder(s) acknowledgement

I/We acknowledge and agree:

- I/we have received and read the terms and conditions for NAB Internet Banking and/or NAB Telephone Banking;
- I/we must ensure that any Authorised User nominated in Section 3 has read and understood the terms and conditions for NAB Internet Banking and/or NAB Telephone Banking;
- that I/we will not disclose to any other person the NAB ID and password issued to me/us by NAB for use by an Authorised User;
- that each Authorised User nominated in Section 3 is able to access information about any Nominated Account and depending on the access level granted by these nominations, can transact on those accounts including by transferring funds between linked accounts whether owned by me/us or not;
- that payments on accounts enabled with Payment Approval are validated against the Pay anyone daily limit of the user that created the payment, not the limits of approvers of the payment (unless one of the approvers created the payment);
- in providing statement access, an Authorised User will have access to up to 7 years of Online Statements for nominated accounts;
- I/we are liable for use of NAB Internet Banking and/or NAB Telephone Banking by an Authorised User or with an Authorised User's authority;
- that an authorised user has the ability to transfer any available funds between the accounts linked to their NAB ID. Internet banking daily limits do not apply to such transfers;
- that an increased daily transfer limit may increase my liability in the case of unauthorised transactions;
- this authority supersedes any earlier authority provided in respect of the same nominated account and authorised user;
- this authority will continue until revoked by me/us in compliance with the terms and conditions for NAB Internet Banking/Telephone Banking and it is my/our responsibility to inform the Authorised User of that revocation; and
- that I am an Account Holder or Account Owner and am authorised to sign this authority.

(Account owners include: sole/joint personal account holders, sole proprietors, company directors, partners (firm/partnership), office bearers (not for profit organisations) & trustees)

Name & Title of Authorised Signatory	Signature	Date
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	X	<input type="text"/> / <input type="text"/> / <input type="text"/>

Section 5 Banker checklist

- Authorised User has received appropriate Terms and Conditions (Personal transaction and savings products OR Business products)
- Telephone banking temporary password has been given to the authorised user where applicable
- SMS eform has been completed if appropriate
- Signatures are from the Account Holders or Account Owners