

## Add an attorney, deputy or representative

If the account holder becomes unwell or unable to make financial decisions, they can appoint someone to help manage their Marcus account(s).

Completing the below form will mean the representatives who hold a power of attorney or other powers given under a court order can open, manage, close and view a Marcus account(s) including any joint accounts held, and make payments. They may legally act on the account holder's behalf to help make financial decisions.

### **What you need to know:**

- We will not provide the account holder's representative separate online access to the account(s) but they will be able to manage the account(s) over the phone.
- If the representative has legal authority to act on our customer's behalf, they may choose to set up online access using their own details if the account holder no longer has capacity to manage their own affairs.
- We can only give online banking access to one party at a time, either donor or attorney.

Authority to act will apply across all accounts held across Marcus (including joint accounts), including any subsequent accounts opened, unless you tell us otherwise.

To open a Cash ISA on behalf of someone else, please call us before filling in this form as additional rules apply to ISAs. Or if you have a question or would like any support completing this form, please call us on 0800 085 6789. Our opening hours are 8am to 8pm, Monday to Friday (excluding bank holidays). We can then advise you on the next steps.

### **What you need to send with this form:**

Original or Certified Power of Attorney (unless you have a government issued digital verification code)  
Any other identification document we may require as part of the account opening requirements

### **Where to post:**

Marcus UK, PO Box 74787, London EC4P 4JG.

## Section 1

**For completion by the account holder or representative.**

Select the type of authority the representative holds:

	England and Wales	Scotland	Northern Ireland
General Power of Attorney			
Lasting Power of Attorney			
Lasting Power of Attorney with Government Issued Digital Verification Code - Enter code in box			
Enduring Power of Attorney (unregistered)			
Enduring Power of Attorney, registered with the Office of Care and Protection			
Enduring Power of Attorney registered with the Office of Public Guardian (OPG)			
Deputyship Order / Court Appointed Deputy			
Continuing Power of Attorney			
Intervention Order			
Guardianship Order			
Controllership Order			

## Section 2: Applicant or account details

**For completion by the account holder or representative.**

Provide details of the Marcus account holder. If the account holder has more than one Marcus account with us, we'll allow the representative to act across all their accounts (including joint accounts), unless there's a legal reason not to.

### Applicant / Account holder(s) information

#### Account holder

Name:

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Date of birth:

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Address:

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Postcode:

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Account number:

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Account number:

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#### Joint account holder

Name:

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Date of birth:

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Address:

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Postcode:

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Account number:

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Account number:

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### Customer capacity:

The customer is not mentally capable of managing their own financial affairs.

The customer is mentally capable of managing their own financial affairs.

## Section 3: Customer declaration

**For completion by the account holder, but only when they're capable of managing their own affairs.**

Please read the declaration and sign below.

I confirm and agree that:

- I give authorisation for the attorney(s), deputy(s) or representative(s) named on this application to manage my Marcus account(s) on my behalf.
- I understand that the listed representatives will only have access to my account(s) using telephone banking.
- The attorney(s), deputy(s) or representative(s) may not be able to use all the features of the account(s).
- I understand that I can revoke this authorisation at any time.

### Account holder

Signed:

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Name:

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Date:

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## Section 4: Representative details

**For completion by the account holder or representative.**

1. How many attorneys will be added to the account(s)?

1

2

3

4

2. How are the representatives appointed? This will be included in the power of attorney document.

Sole

Jointly

Jointly and severally or independently

Please note, if representatives have been appointed to act jointly, we will not be able to authorise action on the account, such as withdrawals, unless we have instructions from all of the representatives. For more information about acting jointly, please contact us.

3. If your power of attorney is temporary, please add the expiry date:

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## Section 5: Representative declaration

**This section should be completed by the representative in all cases, regardless of the mental capacity of the customer. All attorneys appointed to act jointly must sign this form.**

Please add the details of the attorney, deputy or other representatives, and read the declaration and sign to confirm that:

- I have been appointed, either solely or with others, as a third party to operate the Marcus account(s) held by the customer as proven by the documentation provided with this form.
- I confirm any documentation I have provided is a true, complete and accurate copy of the original document.
- If there is more than one representative with permission to manage the customer's Marcus account(s), I confirm I have their consent to instruct Goldman Sachs International Bank.
- I agree that the statement regarding the customer's mental capacity in section 2 is accurate and I agree to inform you if the customer's mental capacity changes.
- All personal information in section 3 is correct. I will notify Goldman Sachs International Bank if this information needs updating.
- I agree to observe the terms and conditions of the customer's account(s), which can be found on the website at [marcus.co.uk/legal-information](https://marcus.co.uk/legal-information).
- I have read the FSCS information sheet, which can be found on the website at [marcus.co.uk/legal-information](https://marcus.co.uk/legal-information).

Name:

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Address:

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Postcode:

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Date of birth:

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Country of residence:

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Phone number:

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Email address:

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Signed:

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Date:

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Name:

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Address:

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Postcode:

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Date of birth:

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Country of residence:

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Phone number:

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Email address:

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Signed:

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Date:

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Name:

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Address:

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Postcode:

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Date of birth:

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Country of residence:

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Phone number:

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Email address:

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Signed:

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Date:

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Name:

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Address:

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Postcode:

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Date of birth:

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Country of residence:

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Phone number:

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Email address:

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Signed:

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Date:

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## Section 6: Personal data

### **Customer**

So that your attorney or third party can manage your account in line with your wishes, we may need to provide them with the personal information we have about you, or request information from them. This may include information about your account and any other relevant information about your circumstances.

### **Attorney, deputy or representative**

We'll use the information provided on this form to allow you to manage the customer's account, help us comply with our legal and regulatory obligations, and for other purposes when it's within our legitimate interests to do so.

Your information will also be shared with third parties (including fraud prevention agencies and risk management companies) to verify your identity and to prevent fraud, money laundering and other financial crimes.

Further details of how your information will be used – as well as your data protection rights – can be found in the privacy policy on our website: [marcus.co.uk/privacy-policy](https://marcus.co.uk/privacy-policy). You can also call us on 0800 085 6789 to request a copy.