

## Access to information form

Please complete this form if you'd like to give someone else access to information about your account(s). They will be able to request information about your account balance and transactions and access support services relating to your account(s) (including unlocking online access to the account(s)) but won't be able to change details, reset passwords, transfer money or take any other action in relation to your account(s).

We can only give other people information about your account(s) through telephone banking, not online banking.

To appoint someone else to manage your account(s) in full, including making payments from your account(s), please fill in our form to add an attorney, deputy or representative instead, downloadable from our website at [marcus.co.uk/help](https://marcus.co.uk/help).

## Joint accounts

If you have a joint account, your joint account holder will also need to give permission for the person named on this form to have access to your joint account. Please make sure your joint account holder signs this form in section 5.

## If you need some help

If you have a question or would like any support completing this form, please call us on 0800 085 6789. Our lines are open Monday to Friday, 8am to 8pm (excluding bank holidays).

Once completed, post an original copy of this form to:

Marcus UK  
PO Box 74787  
London  
EC4P 4JG

# Section 1: Authority

I \_\_\_\_\_ (please write name on your account(s))

and if applicable

I \_\_\_\_\_ (please write the name of the second account holder on your account(s))

authorise you, Goldman Sachs International Bank, to provide the third party named in section 3 below with information and access to support services relating to my /our Marcus account(s) listed below on request, until I/we give you notice in writing to the contrary.

The authority granted under this form to the named third party, will end automatically if either the customer(s) or the third party dies or becomes unable to manage their affairs due to their mental capacity.

# Section 2: Account details

Please provide details of the Marcus account(s) where you'd like to register someone else.

If any of your accounts are joint accounts, please provide both account holders' details here.

## Section 2a: Account holder(s) information

Name of account holder

\_\_\_\_\_

Name of account holder

\_\_\_\_\_

Address

\_\_\_\_\_

Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Postcode

\_\_\_\_\_

Postcode

\_\_\_\_\_

Date of birth

\_\_\_\_\_

Date of birth

\_\_\_\_\_

Section 2b: Account details

Account number

Sort code

Account number

Sort code

Account number

Sort code

Account number

Sort code

### Section 3: Third party details

Please provide details of the person who you'd like to add. You can only add one person to your account(s).

Name

Address

Postcode

Date of birth

Phone number

Alternative phone number

Email address

Country of residence

## Section 4: Personal data

### Customer

So that your 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.

### Third party

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.

## Section 5: Customer declaration (to be completed by all account holders in all cases)

Please read the declaration and sign below. If you're giving someone access to a joint account, please make sure your joint account holder also reviews and signs this declaration.

I/we confirm and agree that:

- I/we authorise the person named in section 3 to access information relating to my/our Marcus account(s) listed in section 2
- I/we authorise you to provide information and access to support services relating to my/our Marcus account(s) listed in section 2 to the person named in section 3 on request.
- I/we understand that this person will only be able to obtain information about my/our account(s) using telephone banking.
- I/we understand that this person will not be able to use any features of my/our account(s) not listed above.
- I/we understand that I/we can revoke this authorisation at any time.

Customer

Signed

\_\_\_\_\_

Date

\_\_\_\_\_

Name

\_\_\_\_\_

Joint account holder

Signed

\_\_\_\_\_

Date

\_\_\_\_\_

Name

\_\_\_\_\_

## Section 6: Third party declaration (to be completed by the third party in all cases)

Please read the declaration and sign below.

I confirm and agree that:

- I wish to be added as a third party to the account(s) listed in section 2.
- All personal information in section 3 is correct. I will notify Marcus, part of 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/uk/en/public-site/fscs](https://marcus.co.uk/uk/en/public-site/fscs).

Signed

Date

\_\_\_\_\_

\_\_\_\_\_

Name

\_\_\_\_\_