

# Change of Name / Ledger Title Amendment / Golden Years / Basic Bank Account Upgrade Form



PLEASE COMPLETE IN BLOCK CAPITALS



Change of Name  Ledger Title Amendment  Basic Bank Account to PCA  PCA to Golden Years

**BANK OF IRELAND ACCOUNT AND POLICY NUMBERS**  
**IMPORTANT:** Please list all your Bank of Ireland account and policy numbers below to ensure that your personal details are updated throughout the Bank of Ireland Group.

**BRANCH ACCOUNTS**

Branch	<input type="text"/>	NSC	<input type="text"/>	Acc No.	<input type="text"/>
Branch	<input type="text"/>	NSC	<input type="text"/>	Acc No.	<input type="text"/>
Branch	<input type="text"/>	NSC	<input type="text"/>	Acc No.	<input type="text"/>
Branch	<input type="text"/>	NSC	<input type="text"/>	Acc No.	<input type="text"/>

**BANK OF IRELAND MORTGAGES**

NSC	<input type="text"/>	Acc No.	<input type="text"/>
NSC	<input type="text"/>	Acc No.	<input type="text"/>

**DEPOSITLINK ACCOUNTS:**

NSC	<input type="text"/>	Acc No.	<input type="text"/>
NSC	<input type="text"/>	Acc No.	<input type="text"/>

**CREDIT CARDS**

Card No.	<input type="text"/>
Card No.	<input type="text"/>

**BANK OF IRELAND FINANCE**

Agreement No.

**BANK OF IRELAND LIFE**

Policy No.

**BANK OF IRELAND INSURANCE SERVICES**

Policy No.

**Note:** Name change will be amended on all cards, cheque books and lodgement books associated with nominated accounts.

**Change of Name (Personal Account Holder 1)**

Existing First Name	<input type="text"/>	Existing Surname	<input type="text"/>
Customer Signature	<input type="text"/> <b>Sign here</b>	Date	<input type="text"/>
Mobile tel no.	<input type="text"/>	Date of birth	<input type="text"/>
Email address	<input type="text"/>		
Revised First Name	<input type="text"/>	Revised Surname	<input type="text"/>

**Change of Name (Personal Account Holder 2) For Joint Account Holders Only – If Applicable**

Existing First Name	<input type="text"/>	Existing Surname	<input type="text"/>
Customer Signature	<input type="text"/> <b>Sign here</b>	Date	<input type="text"/>
Mobile tel no.	<input type="text"/>	Date of birth	<input type="text"/>
Email address	<input type="text"/>		
Revised First Name	<input type="text"/>	Revised Surname	<input type="text"/>

## Change of Name (Business Accounts)

Existing Business Account Name\*

Revised Business Account Name\*

Customer Signature\*\* 

Customer Signature\*\* 

Customer Signature\*\* 

\*Must match the account mandate  
\*\*It is mandatory that this section is signed by customer(s) in accordance with the account mandate held

## PCA to Golden Years / Basic Bank Account to PCA (Mandatory)

- ▶ I received and read a copy of the Terms and Conditions and I agree to be bound by them
- ▶ I received and read a copy of the Terms of Business
- ▶ I received and read a copy of the "Schedule of Fees and Charges for Personal Customers" Brochure
- ▶ I received and read the details of debit interest outlined in the table of "Personal Overdraft Interest Rates" sheet (if applicable)

Customer Signature\*\*\* 

Date   /   /

\*\*\*Customers must tick each box as confirmation that they have received and read all relevant documents

## Internal Branch Use Only (Mandatory)

Ledger Title Amendment (e.g. spelling error)

### Confirmation Sign Off Required

Y/N or N/A

- ▶ Instruction form is fully completed and in order
- ▶ Personal Accounts – signature must be verified
- ▶ Personal Accounts Change of Name - PCIF (completed in full, signed by customer in REVISED name and signed by staff member)
- ▶ Non-personal Accounts - Change of Name - Form signed in accordance with mandate, new mandate with REVISED name and supporting CRO documents if applicable attached
- ▶ Account type change - All boxes ticked as confirmation that relevant documents have been received and read
- ▶ All supporting documents branded 'original sighted/certified true copy' and signed by staff member
- ▶ Sequence of documents: 1. Instruction form 2. PCIF (Personal name change)
- ▶ 3. Any supporting documents e.g. Marriage cert, Trading Certificate 4. New mandate

### Taken by

Staff Name

Staff Signature 

Staff number

### Checked by

Staff Name

Staff Signature 

Staff number