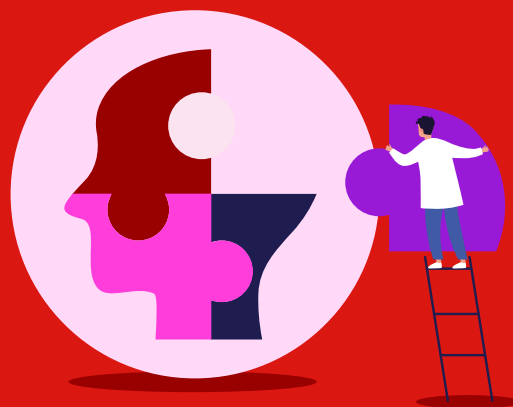


Your guide to completing your Partnership's profile




This guide aims to help Partnerships verify and update Partnership details, as we have missing or incomplete information in our system. By providing this information, you'll better protect the Partnership's account(s) and help reduce the risk of identity theft.

Step 1

Complete and provide the documents listed below.

The form is available at westpac.com.au/IDsecure/business

Tick	Documents required	Who needs to complete and sign them?
<input type="checkbox"/>	Customer verification form	A Partner or Beneficial Owner. (Form definitions are summarised on page 3.)
<input type="checkbox"/>	Certified ID documents	<p>Each Individual who is a Beneficial Owner as nominated on the Customer verification form and the Individual who signed the form (if not a Beneficial Owner). Refer to page 3 for definition of Beneficial Owner.</p> <p>For Certification instructions, search Westpac BizSecure, go to the FAQ section: How do I obtain certification? Please see below for an example of certified ID documents that we would need from each Beneficial Owner (please ensure the images are clear and easy to read):</p> <ul style="list-style-type: none"> ONE Primary Photographic Identification Document, for example: <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  <p>I, <i>Sam Sample</i>, as a <i>Medical Practitioner</i>, certify that this <i>Driver Licence</i>, is a true copy of the original.</p> <p><i>Sam</i> 1 February 2023</p> <p>Driver Licence certified and signed by Medical Practitioner.</p> </div> <p>OR</p>

Tick	Documents required	Who needs to complete and sign them?																								
		<ul style="list-style-type: none"> • ONE Primary Non-Photographic Identification Document and ONE Secondary Identification Document, for example: <div data-bbox="671 405 1465 1070" style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p style="text-align: center;">BIRTH CERTIFICATE</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: center;">1 CHILD</td> <td style="width: 35%;">Family name Given name(s) Date of birth Place of birth</td> <td style="width: 50%;">EXAMPLE Charlie 1 January 1987 Sample Hospital, Sydney</td> </tr> <tr> <td style="text-align: center;">2 MOTHER</td> <td>Maiden family name Given name(s) Occupation Age Place of birth</td> <td>EXAMPLE BROWN Leisha Doctor 35 years Sydney, NSW</td> </tr> <tr> <td style="text-align: center;">3 FATHER</td> <td>Family name Given name(s) Occupation Age Place of birth</td> <td>EXAMPLE Stowe Electrician 37 years Melbourne, VIC</td> </tr> <tr> <td style="text-align: center;">4 MARRIAGE OF PARENTS</td> <td>Date of marriage Place of marriage</td> <td>23 August 1985 Sydney, NSW</td> </tr> <tr> <td style="text-align: center;">5 PREVIOUS CHILDREN OF RELATIONSHIP</td> <td></td> <td>Not any</td> </tr> <tr> <td style="text-align: center;">6 INFORMANTS</td> <td>Name Address</td> <td>S. EXAMPLE 1 Smith Street, Sydney, NSW 2000 Father</td> </tr> <tr> <td style="text-align: center;">7 REGISTERING AUTHORITY</td> <td>Name Date</td> <td>Peter Owen, Registrar 1 January, 1987</td> </tr> <tr> <td style="text-align: center;">8 ENDORSEMENT(S)</td> <td></td> <td>Not any</td> </tr> </table> <p style="font-size: small; margin-top: 5px;">Before accepting copies, sight unaltered original. The original has a colored background.</p> <div style="display: flex; align-items: center; justify-content: space-between;"> <div style="border: 1px solid black; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> </div> <div style="font-size: x-small;"> <p>REGISTRY OF BIRTHS, DEATHS AND MARRIAGES</p> <p>I hereby certify that this is a true copy of particulars recorded in the Commonwealth of Australia</p> <p style="text-align: right;"><i>Hee</i> Registrar</p> </div> <div style="border: 1px solid black; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> </div> </div> </div> <div style="width: 35%; padding-left: 20px;"> <p style="text-align: center; font-weight: bold; font-size: 1.2em;">1234 56789 1</p> <p style="text-align: center; font-weight: bold;">1 Frankie Charlie Example</p> <p style="text-align: right; font-size: small;">VALID TO 12/2025</p> <p style="margin-top: 20px;">I, <i>Sam Sample</i>, as a <i>Medical Practitioner</i>, certify that this <i>Australian Birth Certificate and Medicare card</i>, is a true copy of the original.</p> <p style="text-align: right; margin-top: 10px;"><i>Sam</i></p> <p style="text-align: right; font-weight: bold;">1 February 2023</p> <p style="text-align: center; margin-top: 10px;">Birth Certificate and Medicare card certified and signed by Medical Practitioner.</p> </div> </div> </div>	1 CHILD	Family name Given name(s) Date of birth Place of birth	EXAMPLE Charlie 1 January 1987 Sample Hospital, Sydney	2 MOTHER	Maiden family name Given name(s) Occupation Age Place of birth	EXAMPLE BROWN Leisha Doctor 35 years Sydney, NSW	3 FATHER	Family name Given name(s) Occupation Age Place of birth	EXAMPLE Stowe Electrician 37 years Melbourne, VIC	4 MARRIAGE OF PARENTS	Date of marriage Place of marriage	23 August 1985 Sydney, NSW	5 PREVIOUS CHILDREN OF RELATIONSHIP		Not any	6 INFORMANTS	Name Address	S. EXAMPLE 1 Smith Street, Sydney, NSW 2000 Father	7 REGISTERING AUTHORITY	Name Date	Peter Owen, Registrar 1 January, 1987	8 ENDORSEMENT(S)		Not any
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<input style="width: 30px; height: 30px; border: 1px solid black;" type="checkbox"/>	<p>Please provide a certified copy of at least one of the following verification documents:</p> <ul style="list-style-type: none"> • Partnership meeting minutes (or extract) • Partnership agreement (or extract) • Certificate of registration of business name • Notice issued by the ATO within the last 12 months (e.g. Notice of Assessment) 	<p>The certified verification document needs to include the name of the Association. Please see below for an example of certified verification document:</p> <div data-bbox="678 1205 1460 1579" style="border: 1px solid black; padding: 10px;"> <p style="font-size: small; margin-top: 0;">Minutes of Annual General Meeting XYZ Partnership</p> <p>Meeting held: 20 November 2022</p> <p>Partner attendees: Franki Charlie Sam Jones</p> <p>Discussion: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.</p> <p style="font-size: x-small; margin-top: 5px;">Minutes submitted by Sam Jones Minutes approved by Frankie Charlie</p> <p style="text-align: right; margin-top: 10px;"><i>Hee</i></p> </div> <div style="margin-top: 10px; padding-left: 20px;"> <p>I, <i>Sam Sample</i>, as <i>Medical Practitioner</i>, certify that these <i>Minutes of the Annual General Meeting</i>, are a true copy of the original.</p> <p style="text-align: right; margin-top: 10px;"><i>Sam</i></p> <p style="text-align: right; font-weight: bold;">1 February 2023</p> <p style="text-align: center; margin-top: 10px;">Minutes of Annual General Meeting certified and signed by Medical Practitioner.</p> </div>																								

Step 2

Send your completed and certified documents as listed above in the post via a Reply Paid envelope, addressed to:

Westpac Business Identification Team
Reply Paid 91348
SYDNEY NSW 2001

No stamp is required. If you have any queries, please call our dedicated Business Identification team on **1800 080 702** (or **+61 2 9155 7700** if calling internationally), 9am – 5pm AEST, Monday to Friday.



Form definitions

Westpac Business or Individual Customer Number

Your Westpac Business or Individual Customer Number can be found on the statement in Westpac Online Banking.

Beneficial Owner

A Beneficial Owner is:

1. Each individual who owns (either directly or indirectly) 25% or more of the Partnership, such as a limited partner; OR
2. If no one owns 25% or more, each Individual that Controls (either directly or indirectly) the Partnership.

Where you are not able to identify any such Individual using the previous measures, the following Individual(s) can be treated as if they were a Beneficial Owner: 1. An Individual entitled (either directly or indirectly) to exercise 25% or more of the voting rights, including a power of veto; OR 2. If no one is entitled to exercise 25% or more of the voting rights, an Individual who holds the position of Senior Managing Official (or equivalent), such as the Managing Partner, Chief Executive Officer (CEO), Chief Operating Officer (COO), Chief Financial Officer (CFO), or the Chairman of the Board, or foreign equivalent positions.

Nature of business activities (ANZSIC)

Australia and New Zealand Standard Industry Code (ANZSIC). Please provide us with the industry of your Business e.g: Real Estate Agent, Milk and Cream Manufacturer and we can find this information for you.

Address

Please use a street/physical address, not a PO Box.

Purpose of Business Relationship

This refers to your reasons for engaging with us to obtain products and services. Customers may have multiple reasons. Please choose all applicable options.

Source of Funds

This refers to the origin of the funds that are the subject of the business relationship between you and us. Many customers have multiple sources of funds. Please choose all applicable options.

Source of Wealth

This refers to the origin of your total net assets/total net worth. Many customers will have multiple sources of wealth. Please choose all applicable options.

If you have any queries, please call our dedicated Business Identification team on **1800 080 702** from anywhere in Australia (or **+61 2 9155 7700** if calling internationally) 9am - 5pm AEST, Monday to Friday.

Accessibility support.

At any time, you can inform us how you would prefer to be contacted. If you are deaf and/or find it hard hearing or speaking with people who use a phone, you can reach us through the National Relay Service (NRS). To use the NRS, you can register by scanning the QR Code or visiting infrastructure.gov.au/national-relay-service



Visit westpac.com.au/web-accessibility for further information on our accessible products and services for people with disability.

"QR Code" is a registered trademark of Denso Wave Incorporated.

Westpac acknowledges the traditional owners as the custodians of this land, recognising their connection to land, waters and community. We pay our respect to Australia's First Peoples, and to their Elders, past, present and future.