

# New Client

## Company Account Details

J&W

**Company name** \_\_\_\_\_

**Trading name**  
(if different) \_\_\_\_\_

**Australian Business Number**  
(if applicable) \_\_\_\_\_

**Australian Company Number**  
(if applicable) \_\_\_\_\_

**New Zealand Business Number**  
(if applicable) \_\_\_\_\_

**Postal address** \_\_\_\_\_

**Contact name** \_\_\_\_\_

**Contact email address** \_\_\_\_\_

**Email for accounts**  
(if different) \_\_\_\_\_

I have read and understood the information below and the attached terms of engagement and I am entitled to sign this form on behalf of my company.

**Full name** \_\_\_\_\_

**Position** \_\_\_\_\_

**Email address** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

I understand that James & Wells is asking me for information about my company for the purposes of complying with Anti-Money Laundering legislation and possibly for enabling a credit check with third parties (if circumstances require). I understand that:

- Those third parties may give James & Wells information about my company for that purpose.
- James & Wells may provide information about my company to third parties and that those third parties may hold information on their systems and use it to provide their credit reporting service.
- When other customers of those third parties use that service, those third parties may give the information to those customers.
- James & Wells may use those third parties in the future for purposes related to the provision of credit to my New Client Company Account Details company. This may include using third parties to receive updates of any of the information held about my company.
- If my company defaults on its payment obligations to James & Wells, information about that default may be given to third parties, and those third parties may give information about that default to other customers.

I acknowledge that:

- To the best of my knowledge all details in this application form are true and correct.
- I have the authority to provide the information disclosed in this application form.
- I have received a copy of the James & Wells' [Terms of Engagement](#) and I/my Company understand and will abide by them.

# New Client

## Individual Account Details

J&W

Title	_____	First Name	_____	Last name	_____
Email address	_____			Date of birth	_____
Phone or mobile number	_____				
Postal address	_____				
Physical address (if different)	_____				

I have read and understood the information below and the attached terms of engagement.

Signature	_____	Date	_____
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I understand that James & Wells is asking me for personal information about myself for the purposes of complying with Anti-Money Laundering legislation and possibly for enabling a credit check with third parties (if circumstances require). I understand that:

- Those third parties may give James & Wells information about me for that purpose.
- James & Wells may give my personal information to third parties and that those third parties may hold information on their systems and use it to provide their credit reporting service.
- When other customers of those third parties use that service, those third parties may give the information to those customers.
- James & Wells may use those third parties in the future for purposes related to the provision of credit to me. This may include using third parties to receive updates of any of the information held about me.
- If I default in my payment obligations to James & Wells, information about that default may be given to third parties, and those third parties may give information about my default to other customers.

I acknowledge that:

- To the best of my knowledge all details in this application form are true and correct.
- I have received a copy of the James & Wells' [Terms of Engagement](#) and I understand and will abide by them.