

Account Review - Individual

Rabobank Online Savings

Please print, sign and return this document to us via post or email:

Post: Freepost Rabobank Online Savings, PO Box 38567, Wellington 5045

Email: ClientMaintenanceNZ@rabobank.com

Your details

Full name

Rabobank customer number

Any other name(s) you are known by (if applicable)

Please confirm your personal details below

Contact numbers

Email address

Residential address

Occupation

Industry

About your Account

What is the main purpose of your Account(s) with Rabobank?

- General savings
 Car
 Education
 Emergencies
 Holiday
 Purchase business
 Purchase/Renovate property
 Retirement

Please provide your source of funds.

- Rental income
 Asset sales
 Compensation payment
 Investment proceeds
 Property sale
 Inheritance/Gift
 Competition/Winings
 Private superannuation
 Salary/Wages
 Pension/Benefits

Please confirm how often you still intend to make deposits.

- Weekly
 Monthly
 Annually
 Occasionally

What will be the likely amount(s)?

- \$0-\$5,000
 \$5,001-\$10,000
 \$10,001+

Personal information

Are you a New Zealand citizen?

No Yes

Are you a citizen of another country? (if yes, please list all countries below)

No Yes,

Do you currently have any activities in a country other than New Zealand (this includes, but is not limited to, frequent travel overseas, employment, investments, sale/purchase of goods, payment transactions)? (If yes, please list all countries below)

No Yes,

Commercial property

Do you hold a real estate portfolio that includes investment properties that are not for your own use? (This includes project development and financing of investment properties or development projects)

No Yes

Is your Rabobank Online Savings Account funded by any of the following: rental income* (in part or in full), dividends earned on investment or commercial property(ies) investments, or proceeds of commercial/investment property(ies) sales?

No Yes

If Yes, please answer the following:

a) What is the estimated value of the portfolio?

b) How many investment properties do you own?

* This also includes proceeds from rental income that are transferred into your Rabobank Online Savings Account from any New Zealand bank account in your name that is not held with Rabobank.

Declaration

I confirm that the information provided in this Account Review form is true and correct.

Signature of Account Owner

Date

Full name