

# Grant/change Admin electronic right for user

For the management of products and services offered online via e-finance for administration.

## 1. Details of the business relationship

Company/Name \_\_\_\_\_  
Street \_\_\_\_\_ No. \_\_\_\_\_  
Postcode \_\_\_\_\_ Location \_\_\_\_\_  
 Affects CMT CMT contract number (if available) \_\_\_\_\_

The customer authorizes the person indicated below to manage PostFinance products and services offered for administration within e-finance. The right covers all existing and future functions offered by PostFinance. The authorized person is in particular entitled to open, cancel or change new products and services, to assign and withdraw further electronic rights and authorization profiles and to manage master data. All declarations and measures of the authorized person received in this way are binding on the person granting the authorization. This authorization does not, however, extend to accessing the assets invested in the customer's name at PostFinance. The authorization does not expire if the customer dies, loses the capacity to act or becomes insolvent. It remains in force until PostFinance receives written notice that it should be revoked (article 35 of the Swiss Code of Obligations).

## 2. Details of the Admin User

(if an e-user does not yet exist, a new e-user will be created under the e-finance number)

Ms  Mr E-finance no. \_\_\_\_\_ (9 digits)  
Last name \_\_\_\_\_  
First name \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Nationality \_\_\_\_\_  
Country of domicile \_\_\_\_\_  
Function \_\_\_\_\_  
User identification<sup>1</sup> \_\_\_\_\_

**New e-user with a different address?**  
If it is a new e-user and the correspondence address is a different address to that of the user, an individual address can be entered here.

### Different address

Street \_\_\_\_\_ No. \_\_\_\_\_  
Postcode \_\_\_\_\_  
Location \_\_\_\_\_

<sup>1</sup> Freely definable for new e-users to be opened, at least 4 characters (a-z, 0-9).  
If blank, the user identification will be assigned by PostFinance.

Language  German  French  Italian  English

## 3. Grant/change Admin electronic right for user (please tick as appropriate)

Grant Admin electronic right (please select type of signature, "Individual" or "Collective")  
 individual  
 collective  
 Delete Admin electronic right

Note: Admin electronic right with type of signature set as "Collective" means that each change must be confirmed by a second Admin User.







#### 4. What you have to do when sending us personal data about other people

By sending us data about other people, you confirm that you are authorized to do so and that the data is correct. Before you send the data to us, please ensure that the relevant third parties have been informed that we will process their data and forward them a copy of the enclosed "Information on data protection" document or our Privacy Policy, which you can find at [postfinance.ch/dps](http://postfinance.ch/dps).

#### 5. Signature(s)

Indemnity statement: if the customer signs this form, they agree to the following: they undertake to indemnify PostFinance against any third-party legal claims that may arise from the assignment of rights.

Location	_____	Location	_____
Date	_____	Date	_____
			
Signature*	┌ _____ └	Signature*	┌ _____ └
Last name	_____	Last name	_____
First name	_____	First name	_____

\* Signature of the holder/body or of the substitute authorized representative of the stated business relationship.  
Two signatures are required for collective signing rights.

**Please send to:** PostFinance Ltd, Scan Center, 3002 Bern

#### To be completed by PostFinance

Partner number	_____
Locality code	_____
Staff number	_____



# Info sheet

## Grant/change Admin electronic right for user

This information sheet is designed to help you fill out the form. A separate form must be completed for each user (e-finance user).

This form can also be used for customers who use the Cash & Multibanking Tool (CMT). Please tick the appropriate box and enter the CMT contract number if available.

The following points refer to the corresponding sections in the form:

### Details of the Admin User

The Admin User's details and the e-finance number (9 digits) must be entered here. Details of the person's position in the company/association, date of birth, nationality and country of residence are mandatory.

#### New e-user

If the e-user does not yet exist, a new e-user will be created under the named e-finance number (9 digits). To open a new e-participation, please use the form Registration/change of e-finance for users. You will find details about e-finance at [www.postfinance.ch/e-finance](http://www.postfinance.ch/e-finance).

#### New e-user with a different address

If it is a new e-user and the correspondence address is not the same address as that of the user, a different address can be entered for the new user.

### Grant/change Admin electronic right for user

The granting, changing or deletion of the Admin electronic right is to be indicated here. When granting, the Admin electronic right, the "Individual" or "Collective" signature must be selected.

Note: for the Admin electronic right with type of signature set as "Collective", each change must be confirmed by a second Admin User. In this case, it must be ensured that at minimum a second Admin User exists for the selected business relationship. Where required, an additional form must be completed.

An Admin User cannot grant the Admin e-right to another e-user within e-finance or the Cash & Multibanking Tool (CMT).

#### Self-authorization

PostFinance separates administration and management of PostFinance products and services offered for administration within e-finance. For example, an Admin User cannot grant themselves management rights (e rights and authorization profiles) for PostFinance products and services without a general power of attorney for the administered business relationship. If an Admin User with the "Individual" signature type wishes to grant themselves management rights for PostFinance products and services in order to dispose of the assets held in the customer's name, this change will be prevented if there is no general power of attorney with the "Individual" signature type for the corresponding business relationship. If an Admin User with the "Collective" signature type wishes to grant themselves authorizations for PostFinance products and services, at least one of the two Admin Users must have a general power of attorney with the "Individual" signature type or both Admin Users must have a general power of attorney with the "Collective" signature type.

The separation of administration and management does not apply to third-party bank accounts linked in the Cash & Multibanking Tool (CMT). Within CMT, Admin Users are authorized to set up third-party bank accounts, as well as to manage the rights of the users of these third-party bank accounts in CMT. For third party bank accounts, the Admin User can grant themselves management rights.

### Signatures

The grant/change must be signed by an authorized signatory (holder/body or the substitute authorized representative) of the specified business relationship. Two signatures are required for collective signing.

The indemnity statement ensures that PostFinance is indemnified in the event of a claim or disputes between the customer and a third party.

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