

PRIME MOBI APPLICATION FORM FOR JOINT ACCOUNTS

THE BRANCH MANAGER

 Branch:

 Date:

APPLICANT DETAILS

(PLEASE USE UPPERCASE TO FILL OUT THE FORM)

Joint Account Number	
Account Title	
Mode of Operation (to be filled by branch)	
Primary CIF ID (to be filled by branch)	

MANDATES

Users to be linked to Joint Account in PrimeMobi:

S.NO.	CIF ID	CUSTOMER NAME	SIGNATURE
1			
2			
3			
4			

 Workflow Rule to be setup: 1 Maker + Approvers

(Leave blank if transactions are to be processed without any approvals)

 Follow Hierarchy: YES ☐ NO ☐

(If YES, then please provide below User Details in the hierarchy to follow. If NO, transactions can be approved in any order by the approvers.)

USER DETAILS

S.NO.	CIF ID	ROLE TO BE ASSIGNED TO USER (MAKER/APPROVER/VIEW-ONLY)	TRANSACTION AMOUNT FOR WHICH APPROVAL WILL BE REQUIRED (KES) <small>(Leave blank if approval required for all amounts)</small>		MANDATORY APPROVER (Y/N)
			MIN	MAX	
1					
2					
3					
4					

MAKER: Can only Initiate transaction but cannot Approve.

APPROVER: Can Initiate as well as Approve a transaction

VIEW-ONLY: Can only View the transactions in the account but cannot initiate or approve a transaction.

FOR BRANCH USE ONLY

Please tick below checklist for information provided by the customer:

- | | |
|--|---|
| <input type="checkbox"/> Joint Account Details | <input type="checkbox"/> CIF IDs |
| <input type="checkbox"/> Mandates | <input type="checkbox"/> User Details |
| <input type="checkbox"/> Hierarchy | <input type="checkbox"/> T&C Signed by Primary/ Joint Holder(s) |

We have verified the details furnished in the application and confirm the details and signatures are as per the mandate and correspond to the Core Banking. We recommend to setup Joint Account(s) in PrimeMobi for the Customer(s).

Assistant Manager		Branch Manager	
Name:		Name:	
Signature:		Signature:	
Date:		Date:	

FOR e-BANKING TEAM USE ONLY

Joint Account Details and CIF IDs correspond with the data in core banking. YES ☐ NO ☐

S.NO.	SETUP ACTIVITY	USER NAME	DATE AND TIME	SIGNATURE
1	JOINT ACCOUNT SETUP BY			
	AUTHORIZED BY			
2	USER LINKING SETUP BY			
	AUTHORIZED BY			

Application Received On: Registration Serial No.

Signature of M-Banking Manager: