

junior cash ISA application

D Agreement to Assign Windfalls to Charity

Please read this section

Note: This Agreement does not apply to you if (i) you have held shares in the Society at all times since 26th April 2000 or (ii) you are a borrowing member of the Society or (iii) you are, in respect of the account for which you are now applying, in one of the other groups of people that the Society has decided should be exempt*. Where more than one of you is signing this form the above Note and, if applicable, the rest of this Agreement apply to each of you separately.

1 I agree with the Society that I will assign to the selected charity my right to receive any windfall benefits. I authorise the Society and any successor to pass any windfall benefits direct to the selected charity (or to any other charity which the selected charity may nominate) without giving any notice to me. I understand that the selected charity will have the benefit of this Agreement, and that neither it nor the Society will release me from it or vary its terms, even if the Society decides at some stage in the future that new shareholding members generally will not be required to enter into similar agreements. I authorise the Society to give the selected

charity any information about me and any account that I have with the Society (either now or in the future) but only if the selected charity reasonably needs it for any purpose arising out of this Agreement. I understand that if the Society no longer exists following a merger with another building society, this Agreement will still apply between me and the other society.

2 In this Agreement:
(a) "selected charity" means the Charities Aid Foundation or, if it ceases to be registered as a charity, any other registered charity selected by it;
(b) "windfall benefits" means any benefits which I may become entitled to as a shareholding member of the Society under the terms of any future transfer of the Society's business to a successor (i.e. on a conversion or take-over). The expression "windfall benefits" does not include (i) the right to have savings in a share account with the Society replaced by savings in a deposit account with the successor or (ii) if I am in one of the groups of people that the Society has decided may keep some or all benefits*,

those benefits which the Society has decided I may keep or (iii) any benefits conferred under the terms of any future transfer of the Society's business to a successor which is publicly announced more than three years after the Society has published a notice in the press publicising a decision by the Society either (a) that it will no longer require new shareholding members to enter into agreements to assign benefits to charity or (b) that new shareholding members' agreements will only require them to assign benefits to charity if an event relating to a transfer of the Society's business to a successor occurs during a fixed term specified in their agreements; and "successor" means any company or other corporate body to which the Society transfers its business under Section 97 of the Building Societies Act 1986 (or under any provision which amends or replaces it).

* Details of these groups and (where applicable) the benefits that may be kept are available from the Society. The number and composition of the groups may be changed from time to time but no change will apply retrospectively.

E Customer Declaration

Please read and sign this section

I declare that:

The child named in Section A will be the beneficial owner of the account investments

I am the child / I have parental responsibility for that child (delete which does not apply)

I / the child does not have a Child Trust Fund account

I will be the registered contact for the JISA

The child is resident and ordinarily resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to / in a civil partnership with a UK Crown servant

I have not subscribed and will not subscribe to another JISA of this type for this child

I am not aware that this child has another JISA of this type

I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit

I will not knowingly make subscriptions to JSAs for this child that will result in the subscription limit being exceeded.

I authorise Buckinghamshire Building Society:

To hold the child's cash subscription, JISA investments, interest, dividend and any other rights or proceeds in respect of those investments and any other cash;

To make on the child's behalf any claims to relief from tax in respect of JISA investments.

I agree to the JISA terms and conditions.

I declare that this application form has been completed to the best of my knowledge and belief.

Please ensure you have read and completed all sections of this form before signing.

I agree to be bound by the conditions detailed in this application.

Signature _____

Date ____/____/____

Application Form

Junior Cash ISA

Thank you for choosing a Buckinghamshire Building Society Junior Cash ISA. In conjunction with this leaflet you will need to read and understand the Society's leaflet "Essential Information for Investors" containing the Society's Terms and Conditions and other important information. You will also need to read the specific Terms and Conditions contained in the Junior Cash ISA leaflet.

If you have not received these leaflets, please contact us on 01494 879500, and we will send them to you.

When applying for this Junior Cash ISA, it is important that:

1. You read and understand the "Assignment of Windfalls to Charity" (D), the "Data Protection Act 1998" (C) and the Customer Declaration (E).
2. Section E MUST be signed by the applicant who will be known as the registered contact. The registered contact must have parental responsibility for the child.
3. You complete the Applicant section with your own details, and fill in all the relevant details for the child.
4. You send back the completed form together with identification for the child and a cheque to open the account.

Buckinghamshire Building Society,
High Street, Chalfont St Giles,
Bucks HP8 4QB

For more information on the Society or any of our other products, please visit our website:
www.bucksbs.co.uk



www.bucksbs.co.uk

For office use only

Account opened: In Person

Post

Cashier

Book no.

A/C no.

A Application Details

Please complete with your own and the child's details

Applicant's Details

Title (Mr/Mrs/Miss/Ms): Surname:

Forename(s) in full:

Date of Birth:

Nationality:

Country of Birth:

Permanent Residential Address:

Post Code:

Occupation:

Contact Tel (daytime):

E-mail address:

I apply to open a Junior Cash ISA (JISA) for: Child's Details

Title (Mr/Miss): Surname:

Forename(s) in full:

Date of Birth:

Nationality:

Country of Birth:

Permanent Residential Address:

Post Code:

Child's National Insurance Number (if they have one):

B Investment and Interest Details

I wish to invest £

in a Junior Cash ISA with Buckinghamshire Building Society

Interest will be credited annually to the account at 31st December and on maturity on the child's 18th birthday

C Data Protection Act 1998

Please read this section

The data we will hold is to enable us to administer your account and for marketing purposes. It will not be released to a third party. From time to time the Society contacts its members to provide details of new products and services which it is offering. We will never send you information from third parties. If you do not wish to receive such information please tick box.

We will remind you of your right not to receive marketing information every 3 years.

You have a right to receive a copy of the information we hold about you if you apply to us in writing. A fee will be payable.