

Cash ISA Easy Access Tracker Application Form

YOUR INVESTMENT

- I wish to invest the sum of £
- Into the following account: Cash ISA Easy Access Tracker
- I require the interest to be paid: Annually into this account
 Annually into my nominated account below

NOMINATED BANK ACCOUNT FOR WITHDRAWAL PURPOSES AND PAYMENT OF INTEREST

A bank/building society account is mandatory. It will be used for transferring money out of your savings account and if required the interest. The account must be in your name (or joint names if it is a joint account) and must be able to accept electronic payments via the Faster Payments Service. If the opening cheque is not from this nominated bank account, please forward a recent statement, as evidence that this is a personal current account in your name(s).

Bank/Building Society Name:

Bank/Building Society account in the name(s) of:

Account Number:

Sort Code: - -

APPLICANT DETAILS

Title (Mr/Mrs/Miss/Ms/Other): Date of Birth: (Day/Month/Year)

Forenames (In Full):

Surname:

Country of Birth: Nationality:

Permanent Address: Postcode:

Occupation:

Employed Self-Employed Not Employed Retired Student

Tel (Daytime): Mobile:

Email:

Do you have a National Insurance Number (NINO)? Yes No *If, yes please enter here:*

Are you a citizen and tax resident of the UK only? Yes No

If no, please note we are unable to open accounts for individuals who hold tax residency status in any other country, despite also being a UK tax resident.

APPLICANT DETAILS

Are you an individual, or are you related to or have a close association with someone who is in a prominent position in public life?

Yes No

If yes, please provide details:

Positions include Heads of Government, members of the judiciary, high ranking members of the services or senior figures in state owned enterprises.

YOUR INFORMATION

In order to enhance our security safeguards please complete all questions. Failure to fully complete this section may lead to delays in opening your account.

Do you have any existing Buckinghamshire Building Society accounts? Yes No

Please specify the purpose of this savings account e.g. holiday/car/future

Approximately how often will you use this account? Weekly Monthly Annually Occasionally

Please provide details of where the money has originated from:

Inheritance Sale of a property Saving from income Other Please specify

The Society may require you to supply evidence to support the information you have provided.

PERSONAL INFORMATION

Buckinghamshire Building Society is committed to protecting your privacy and keeping your personal information secure. When you register an enquiry or complete an application form, you are authorising the Society to collect your personal information to process and operate your account(s). The Society does not share your data with any other organisation for marketing or promotional purposes. Our Privacy Notice is available on our website or you can ask us to send you a copy.

ANNUAL GENERAL MEETING

By holding an account with us, you may be eligible to vote at our Annual General Meeting. If so, how would you like to receive your AGM pack? (Selecting email helps us redirect resources from printing and postage to improve member services.)

Email Post

KEEPING YOU INFORMED

In order to provide you with the service you require, Buckinghamshire Building Society will use your contact details to provide you with information about your account and the Society. We will not share this information with any third parties. Please tick one preferred contact method:

Email Post Telephone/SMS

MARKETING PREFERENCES

We'd love to keep you updated about important info like new mortgage products, our community initiatives and latest savings account rates. How would you prefer we contact you - email, post, text or phone? Don't worry, you can opt out at any time if you change your mind (You can tick all 3).

Email Post Telephone/SMS

I/We will be bound by the Society's charitable assignment scheme as set out in the Savings General Terms and Conditions.

CUSTOMER DECLARATION

I apply to subscribe for a:

Cash ISA Easy Access Tracker

for the tax year 20 ___/20 ___ and each subsequent year until further notice.

I declare that:

All subscriptions made, and to be made, belong to me;

I am 18 years of age or over;

I have not subscribed, and will not subscribe to, more than the overall subscription limit total in the same tax year.

I am resident in the United Kingdom for tax purposes, or if not so resident, either perform duties which, by virtue of section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Buckinghamshire Building Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I agree to the ISA terms and conditions.

I have read the account Terms and Conditions and I agree to be bound by those Terms and conditions and by the Rules of the Society.

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

I understand that to confirm my identity, the Society will use an electronic verification system and will require a copy of my identification documents.

I authorise Buckinghamshire Building Society:

To hold my cash subscriptions and any interest earned on those subscriptions;

To make on my behalf any claims to relief from tax in respect of ISA investments.

I acknowledge that I have received and read the FSCS information sheet and exclusion list

Please tick box to confirm

Signature:

Date:

For office use only

Customer Number

□ □ □ □ □ □ □ □

Book Number

□ □ □ □ □ □ □ □

Account Number

□ □ □ □ □ □ — □ □ □ □ □ □ — □ □