

Your Investment

I/We wish to invest the sum of £ in the following: Cash ISA

- I require the interest to be paid:
- annually into this account
 - annually into my nominated account below
 - monthly 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

Title: (Mr/Mrs/Miss/Ms)

Surname:

Forenames in Full:

Permanent Address:

Postcode:

Date of Birth:

Nationality

Country of Birth:

Occupation

- Employed Self-Employed Not Employed Retired Student

Tel: (Daytime) Mobile:

E-mail:

Do you have a National Insurance Number (NINO)? Yes No

If, yes please enter here:

Tax Residency:
Do you hold tax residency status in any country besides the United Kingdom? Yes No

If yes, please note we are unable to open accounts for individuals who hold tax resident status in any other country, despite also being a UK tax resident.

Do you hold dual citizenship? Yes No

If yes, please list the countries:

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.

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 Telephone/SMS Post

Marketing Preferences

Buckinghamshire Building Society would like to provide you with information on our other products and services relating to savings and mortgages that may be of interest to you. If you would like us to send you marketing communications, please tick at least one box below (you can tick all three):

Email Telephone/SMS Post

Customer Declaration

I apply to subscribe for a:

Cash ISA

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: _____

Please return your form with a photocopy of suitable identification (as listed in our Identification Leaflet) to:

Buckinghamshire Building Society,
High Street, Chalfont St Giles, Bucks HP8 4QB
Tel: 01494 879500
Email: info@bucksbs.co.uk www.bucksbs.co.uk

For office use only

Book Number	Customer Number
<input type="text"/>	<input type="text"/>
Account Number	
<input type="text"/>	