

# Fixed Rate Bond Application Form

## YOUR INVESTMENT

I/we wish to invest the sum of

£

Into the Fixed Rate Bond Issue:

I/we require the interest to be paid:

Annually into this account

For 1 year bonds interest will be paid into the account on maturity.

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

### FIRST APPLICANT

### SECOND APPLICANT

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

Forenames (In Full):

Surname:

Date of Birth:

(Day/Month/Year)

(Day/Month/Year)

Nationality:

Country of Birth:

Permanent Address:

Postcode:

Postcode:

Occupation:

Employed  Self-Employed  Not Employed

Employed  Self-Employed  Not Employed

Retired  Student

Retired  Student

Tel (Daytime):

Mobile:

Email:

**APPLICANT DETAILS**  
**CONTINUED**

**Do you have a National Insurance Number (NINO)?**

*If, yes please enter here:*

**Are you a citizen and tax resident of the UK only?**

**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?**

**FIRST APPLICANT**

Yes  No

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.*

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.*

**SECOND APPLICANT**

Yes  No

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.*

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*

**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.)

**Applicant 1**  Email  Post

**Applicant 2**  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:

**Applicant 1**  Email  Post  Telephone/SMS

**Applicant 2**  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).

**Applicant 1**  Email  Post  Telephone/SMS

**Applicant 2**  Email  Post  Telephone/SMS

## CHARITABLE ASSIGNMENT AGREEMENT

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) I/We agree to be bound by the Terms and Conditions of this account and the Rules of the Society.
- ii) I/We hereby declare that I am/we are not a bare trustee (or in Scotland, a simple trustee) for a body corporate, or for persons who include a body corporate.
- iii) I/We hereby declare that this amount is being invested in the Buckinghamshire Building Society by me/us as sole/joint beneficial owner(s).
- iv) I/We undertake to advise Buckinghamshire Building Society of any changes in circumstances which affect my/our tax residency status.
- v) I/We declare that I/we have completed this application form to the best of my/our knowledge and belief.
- vi) **I/We acknowledge that we have received and read the FSCS information sheet and exclusion list**  Please tick box to confirm

**Withdrawals and other instructions to be permitted with:**  Any one signature  Signatures of both account holders

### FIRST APPLICANT

Signature:

Date:

### SECOND APPLICANT

Signature:

Date:

## OPENING AN ACCOUNT

**To open this account you will need:**

(please tick)

- Photocopy of suitable identification (as listed in our Identification Leaflet)
- A fully completed application form
- A cheque made payable to the account holder(s)

Send these documents to:

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

Tel: 01494 879500

For office use only

Customer Number

Book Number

Account Number

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