

application

Your Investment

I wish to invest the sum of £ in the Regular Savers account.
Interest will be paid annually on 31st December

Nominated Bank Account for Withdrawal 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: _____

Post Code: _____
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
Are you a citizen and tax resident of the UK only? Yes No
Are you a citizen of the USA? Yes No

List the countries other than the UK of which you are a tax resident together with the tax reference number (TIN).
Country TIN

Are you (or are you related to or have a close association with someone who is) in a prominent position in public life?
If yes, please provide full details _____ Yes No

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 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

Approximate amount to be saved per month: up to £100 up to £500

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

The 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 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 products and services relating to savings and mortgages that may be of interest to you. Please tick at least one box below (you can tick all three)

I would like to receive marketing communications by:

Email Telephone/SMS Post

Charitable Assignment Agreement

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

Customer Declaration

Please read and sign this section

- (i) I agree to be bound by the Terms and Conditions of this account and the Rules of the Society.
- (ii) I hereby declare that I am 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 hereby declare that this amount is being invested in the Buckinghamshire Building Society by me as sole beneficial owner.
- (iv) I undertake to advise Buckinghamshire Building Society of any changes in circumstances which affect my tax residency status.
- (v) I declare that this application form has been completed to the best of my knowledge and belief.
- (vi) I acknowledge that I have received and read the FSCS information sheet and exclusion list.

(please tick)

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