



Help to Buy accounts application

Your Investment

I/We wish to invest the sum of £ in the Buckinghamshire Building Society Help to Buy: ISA.

The maximum initial subscription is £1,200. This incorporates a maximum deposit of £1,000 in the calendar month of opening and the £200 first month subscription. You can open this account with £1.

Transfers from other ISAs are only permitted in the first month up to the limit of £1,200.

Apart from the first month, the maximum monthly subscription is £200. There is no minimum amount.

If you will be subscribing the same amount by standing order, state the monthly amount £

Interest will be paid into the account annually at 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: *You should be able to find your NINO on a payslip, P45 or P60, letter from DWP or pension order book.*

If you do not have a NI number you must apply for one in order to open a Help to Buy: ISA

Charitable Assignments Agreement

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

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 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 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 Please read and sign this section

I apply to subscribe for the Buckinghamshire Building Society Help to Buy: 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 16 years of age or over;

I have not subscribed/made payments, and will not subscribe/make payments more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA, and a Lifetime ISA in the same tax year.

I have not subscribed and will not subscribe more than the cash ISA subscription limit to one cash ISA;

I have not subscribed and will not subscribe to another cash ISA in the same year that I subscribe to this cash ISA; (delete if you will not be subscribing to this cash ISA).

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 to be married to, or in a civil partnership with, a person who performs such duties.

I have read the account Terms and Conditions and that I agree to be bound by those Terms and Conditions and by the Rules of the Society. (please tick)

I acknowledge I have read and received the FSCS information sheet and exclusion list. (please tick)

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.

Help to Buy: ISA Declaration

I confirm, for the benefit of the Administrator and HM Treasury, that by making this Eligible Customer Declaration:

1. I do not own, and never have owned, any interest in land, whether in the United Kingdom or elsewhere, which:

(A) is:

(i) in England or Wales;

(a) Freehold;

(b) Leasehold, where the lease was originally granted for a term certain exceeding 21 years; or

(c) Commonhold, or

(ii) In Scotland, registered or recorded, or would be capable of being registered or recorded, as a right of absolute ownership in the Land Register of Scotland or General Register of Sasines in Scotland, as applicable; or

(iii) in Northern Ireland;

(a) Freehold; or

(b) Leasehold, where the lease was originally granted for a term certain exceeding 21 years; or

(iv) An equivalent interest in land to the interests in land listed in paragraph (A) (i) to (iii) above under the laws of any jurisdiction outside the United Kingdom; and

(B) Comprises a building that is used or suitable for use as a dwelling, or is in the process of being constructed or adapted for such use; and

(C) (i) Which I acquired as a purchaser by way of sole or joint ownership; or

(ii) Which entitles me to possess or occupy that land.

2. I have not previously received payment of a Bonus under the Help to Buy: ISA Scheme Rules (unless the full amount of such Bonus has subsequently been repaid to the Administrator in accordance with the Scheme Rules).

3. I have not paid, and will not pay, into this Help to Buy: ISA more than the applicable monthly allowance, as set out in the Scheme Rules.

4. I understand that I can only hold one Help to Buy: ISA at any time.

5. I have been supplied with, or have had made available to me, a copy of the Scheme Rules, or have been provided with, or had made available to me, a link to a website where the Scheme Rules can be accessed, and I agree to be bound from the date of this agreement as an Eligible Customer by the Scheme Rules, as such may be amended and/or restated from time to time.

I agree to the Help to Buy: ISA terms and conditions.

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

By signing below and solely in relation to my Help to Buy: ISA, I provide my express consent to allow Buckinghamshire Building Society to share relevant personal data and information with the Administrator (including agents, subcontractors and/or any party appointed to carry out administrative duties of Help to Buy: ISA by HM Treasury) and HM Treasury itself.

Signature: _____ **Date** _____

Customer number

Book number

Account number

For office use only