

APPLICATION FORM:

Adult Savings Account

Account No

Please complete this form in BLACK INK with BLOCK CAPITALS

ACCOUNT TYPE – Select the account you wish to open below, available to over 18’s only

I wish to open the below account with an initial deposit of £.....

☐ 21 Club ☐ Instant Access ☐ 30 Days’ Notice

PERSONAL DETAILS (Applicant 1)

Title: Surname: First Name(s): Date of birth:

National insurance number:

Permanent address:

..... Post code:

(If less than 12 months please provide previous address details)

.....

Home telephone: Mobile telephone:

Email address:

PERSONAL DETAILS (Applicant 2)

Title: Surname: First Name(s): Date of birth:

National insurance number:

Permanent address:

..... Post code:

(If less than 12 months please provide previous address details)

.....

Home telephone: Mobile telephone:

Email address:

Correspondence will be sent to the address stated by applicant 1

TAX RESIDENCY

Are you a resident for tax purposes only in the UK? ☐ Yes ☐ No

Are you a citizen only of the UK? ☐ Yes ☐ No

Please list the countries other than the UK of which you are a tax resident, if any, together with any associated tax reference number.

Country/Countries of tax residency

Tax reference number

.....

.....

.....

.....

INTEREST INSTRUCTION

I/We require interest to be: (please tick one) 1.Added to the account ☐ 2.Paid into my/our bank account ☐

Account number: Sort code:

Name on account: Name of bank:

JOINT ACCOUNT HOLDERS ONLY

We authorise the Society to permit the following signatures to operate the account(s):

☐ Any one signature ☐ Any two signatures ☐ All signatures

IMPORTANT: PLEASE READ AND SIGN THE DECLARATION BELOW

AGREEMENT TO ASSIGN AND INVESTOR DECLARATION

I have read the section titled 'Charitable assignment' within the General Terms and Conditions for Retail Savings Accounts, and agree that I will transfer to the Charitable Aid Foundation my rights to any windfall conversion benefits to which I may be entitled to, unless I fall within the exceptions contained within that section. Further details of this are available in the General Terms & Conditions for Retail Savings Accounts on the website and a copy can be posted to you on request.

PRIVACY NOTICE

- Data Protection regulations require Harpenden Building Society (the Society) to inform customers about how their personal data will be processed.
- Personal data includes customer's name, addresses, financial information and other personal information needed for opening an account.
- The Society will restrict its processing of your personal data to the minimum required to open and manage your account, update you on your account status and inform you of any new savings products. Your personal information will also be processed to comply with the Society's legal and regulatory obligations and to ensure that we continue to operate the Society in a way to safeguard your investment.
- The Society will not send you marketing material on any other services and will not share your personal details with any other organisation for marketing purposes, without your consent.
- Your personal details will be stored securely by the Society and its specialist suppliers, in countries that have equivalent data protection rules, and will only be used to communicate with you whilst you have an account with the Society.
- Further information on how the Society handles your personal data is available under the 'Privacy' menu option on our website.
- You are entitled to request the Society to restrict its use of your personal data. If you have any questions about how we manage your personal data, or wish to make a complaint, please contact the Data Protection Officer in the first instance on: privacy@harpendenbs.co.uk.
- If you are not satisfied with the handling of your complaint by the Society, you can also make a complaint to the Information Commissioner's Office on: ico.org.uk.

CONSENT FOR COMMUNICATIONS

The Society will contact you in the future about this account. We may send you updates about our other products which may be of interest to you. If you are happy to receive this information by email please indicate this by ticking the following box. ☐

INVESTOR DECLARATION

It is essential that you read and understand the terms within this declaration before signing below.

1. I/We consent and acknowledge that the Society will carry out an electronic check to verify my identity.
2. I/We confirm that the amount being invested is: **(Tick as appropriate)**
By me as the sole beneficiary ☐ By me/us as an attorney/deputy on behalf of the applicant(s) ☐
3. I/We confirm that the account will not be held by me/us as a trustee for a corporate body, or for persons who include a corporate body.
4. I/We agree to the specific terms and conditions applying to the account, the General Terms & Conditions for Retail Savings Accounts and to be bound by the rules of the Society (a copy of which is available on the website and/or can be posted to you upon request).
5. I/We declare that the information provided on the application form is true to the best of my/our knowledge and belief.
6. I/We will inform the Society of any changes in our citizenship or tax residency such as moving outside the UK that may affect this declaration.
7. I/We authorise the Society to operate the account according to the instructions indicated on this application form.
8. I/We have read the section titled Privacy Notice and understand that the Society must process my/our personal information in order to provide a savings account.
9. **I/We confirm by ticking the appropriate box that I/we have read the following:**
 - a. **General Terms & Conditions for Savings Account** ☐
 - b. **Financial Services Compensation Scheme (FSCS) Information Sheet** ☐

It is important that you read the FSCS information sheet. It provides information about the protection of your savings deposits.

If you have not confirmed that you've read the above documents and signed the form we will not be able to proceed with your application.

APPLICATIONS WILL NOT BE ACCEPTED WITHOUT A SIGNATURE AND CONFIRMATION OF RECEIPT OF FSCS INFORMATION SHEET

Signature 1

Signature 2

Date

WARNING: FALSE STATEMENTS MAY RESULT IN PENALTIES OR PROSECUTION

FOR OFFICE USE ONLY

BRANCH:

CIN (1)

CIN (2)

ID (1)

ID (1)

ID (2)

ID (2)

Date opened:

Initials:

Date checked:

Initials: