

Business Savings Account Product Switch Form

(Please note this form is only to be used for the transfer of one Business Savings product to another. For change of business details, signing instructions or interest instructions, please request the relevant form(s) from a member of staff).

ACCOUNT HOLDER(S)

Account Full Name:

Address:

Contact telephone number:

Email address:

EXISTING PRODUCT AND ACCOUNT NUMBER

Product Name:

Account No

NEW PRODUCT NAME

The new Product I wish to convert to:

HOW ARE YOU EXPECTING TO USE THE ACCOUNT?

Please tick the box that applies:

Regular/General Savings (e.g. from surplus income) Other (If other please state)

MARKETING AND COMMUNICATION PREFERENCES

Choose your preferences to receive updates from us.

As a Member, at times we will contact you about our services and any improvements we make, or any changes to your account. You can also choose to opt in to receive any marketing communication from us regarding our products and promotions in any of the channels below:

Post Email SMS Telephone

We also provide our communication and documents in alternative formats.

Please select the following if they are required: Large print Braille

Or you can request the above by calling our Member Services Team on 01582 765 411 - Option 1

IMPORTANT: PLEASE READ AND SIGN THE DECLARATION BELOW

IMPORTANT DECLARATION

By submitting this application I/we declare that:

1. All information supplied is true and accurate to the best of my knowledge.
2. I have permission and authority to apply for this account on behalf of the business, owners and authorised users and they are aware that their information has been shared with Harpenden Building Society for this purpose.
3. I understand that to comply with its legal and regulatory obligations the information supplied in this application will be verified. Harpenden Building Society uses third parties to verify the information, one being SmartSearch which will leave a non-credit footprint on the applicable record. A record of the output will be supplied to Harpenden Building Society and retained.
4. The working practices of our business do not directly pose a risk of serious harm to individuals or groups, such as human rights abuses, immoderate political or other beliefs, business dealings with oppressive regimes, unethical employment practices, the support of unethical operations (eg armament sales to military regimes, tobacco production, animal testing for only cosmetic purposes etc) or environmentally damaging practices.
5. As detailed in the relevant account terms and conditions, I understand how the information I have provided will be processed, my rights and how to contact the Data Protection Officer.
6. I/We agree to the specific terms and conditions applying to the account, the General Terms & Conditions for Business Deposit 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).

Tick to confirm you have read and accept the above declaration statements which constitute our agreement.

On behalf of the organisation, authorised users and owners. This must be signed by a **Shareholder/Director**.

Name:.....

Signature:..... Date:.....

You are confirming the receipt of the Financial Services Compensation Scheme Information Sheet and Exclusions.

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.

NEXT STEPS

- Send your completed application to us by post at: Harpenden Building Society, Mardall House, 9-11 Vaughan Road, Harpenden AL5 4HU OR by email to specialistaccounts@harpendenbs.co.uk.
- Or you can leave your completed application form with any members of our Team in any of our branches.
- We will contact you (and any other authorised users) within two business days on receipt of your application.
- If you need any support completing this application please contact the team on 01582 765411 Monday-Friday 9am-5pm, excluding bank holidays.
- Further information can be found on our website at www.harpendenbs.co.uk.

Leave us a review with Smart Money People
 Visit harpendenbs.co.uk/your-feedback



Our Business Savings FAQs
 Visit harpendenbs.co.uk/business-savings-faqs



Useful documents to help manage your business account
 Visit harpendenbs.co.uk/business-savings-usefuldocs



FOR OFFICE USE ONLY		BRANCH:	
CIN (1)		CIN (2)	
ID (1)		ID (1)	
ID (2)		ID (2)	
Date opened:	Initials:	Date checked:	Initials: