

Adding or Removing a Party from a SIPP Cash Deposit

Please complete this form if you are adding or removing someone from an existing Harpenden Building Society SIPP cash deposit account.

Identification may be required for individuals being added to the account. Please refer to the ID Requirements document (available on the Harpenden Building Society website.)

Use additional forms if:

- More than two people are being added, or
- You wish to add or remove a party from another HBS account

Administrators and/or trustees being added to the account. Please complete ALL fields. Administrators and/or Trustees will have full access to the account, on behalf of the SIPP.

Account Details

Account Name:	
Account Number:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Individuals being removed from the account:

Full Name:	
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New Administrator/Trustee SIPP

Title:	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Mx <input type="checkbox"/> Other (please specify)
First name:	
Middle name(s):	
Surname:	
Contact Number:	
Email:	
Administrator/Trustee's Address:	
	Postcode:

New Administrator/Trustee SIPP

Title:	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Mx	<input type="checkbox"/> Other (please specify)
First name:					
Middle name(s):					
Surname:					
Contact Number:					
Email:					
Administrator/Trustee's Address:					
	Postcode:				

New Administrator/Trustee SIPP

Title:	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Mx	<input type="checkbox"/> Other (please specify)
First name:					
Middle name(s):					
Surname:					
Contact Number:					
Email:					
Administrator/Trustee's Address:					
	Postcode:				

New Administrator/Trustee SIPP

Title:	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Mx	<input type="checkbox"/> Other (please specify)
First name:					
Middle name(s):					
Surname:					
Contact Number:					
Email:					
Administrator/Trustee's Address:					
	Postcode:				

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/our knowledge.
2. I/we have permission and authority to make amendments to this account on behalf of the Trust, Trustees, and Beneficiaries, and they are aware their information has been shared with Harpenden Building Society.
3. To comply with legal and regulatory obligations, the information supplied will be verified.
4. I/we understand how the information provided will be processed and how to contact the Data Protection Officer.
5. I have read and agree to the specific terms and conditions applying to the account, the General Terms and Conditions for 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 on request.)

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

SIPP MANDATE (to be signed by the Scheme Trustee(s)):

- I authorise you to comply with all instructions relating to the account, including instructions to withdraw or transfer funds to or from the account to the designated bank account of the Scheme Member, are in writing and the document bearing the instructions is verified by the original signatures of any two of the authorised signatories.

Full Name:

Scheme Trustee Signature: Date:

Full Name:

Scheme Trustee Signature: Date:

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 form 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 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 form 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.

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Compare our specialist accounts
 Visit harpendenbs.co.uk/compare-specialist-accounts



Useful documents to help manage your SIPP accounts
 Visit harpendenbs.co.uk/useful-forms-documents



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