Adult Savings Account Product Switch Form

Harpenden Building Society

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

ACCOUNT HOLDER(S)

Applicant 1 Full Name:

National insurance number:

Date of birth:

DAY | MONTH | YEAR

Address:

Contact telephone number:

Email address:

Applicant 2 Full Name:

National insurance number:

Date of birth:

DAY | MONTH | YEAR

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 income)
- ☐ Saving for a specific purpose
- ☐ General account for paying bills etc.
- ☐ Other (If other please state)

Please turn over

IMPORTANT: PLEASE READ AND SIGN THE DECLARATION BELOW

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 letter or 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/our identity.
2. 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.
3. 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).
4. I/We declare that the information provided on the product switch form is true to the best of my/our knowledge and belief.
5. 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.
6. I/We authorise the Society to operate the account according to the instructions indicated on the initial account opening application form.
7. 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. This is our standard customer agreement upon which we intend to rely. For your own benefit and protection you should fully read the declarations on this product switch form and the terms and conditions on the account that you wish to transfer to. You should do this before signing this form. If you do not understand any of the points please ask us for further information. You are confirming the receipt of the Financial Services Compensation Scheme Information Sheet and Exclusions List.

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 of conversion:		Initials:	
New Account Number:			