Adult ISA Savings Account Product Switch Form

Harpenden Building Society

(Please note this form is only to be used for the transfer of one Adult Savings ISA product to another ISA product, excluding 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

Applicant Full Name:

National Insurance (NI) number:

Date of birth:

DAY	MONTH	YEAR

Contact telephone number:

Address:

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)
- ☐ General account for paying bills etc.
- ☐ Saving for a specific purpose
- ☐ 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.

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 communications 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

INVESTOR DECLARATION

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

1. All subscriptions made, and to be made, belong to me.
2. I am 18 years of age or over.
3. I have not subscribed, and will not subscribe more than the overall subscription 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.
4. 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 Income Tax (Earnings & 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 Harpenden Building Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
5. I consent and acknowledge that the Society will carry out an electronic check to verify my identity.
6. I 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 our website and/or can be posted to you upon request).
7. I declare that the information provided on the application form is true to the best of my knowledge and belief.
8. I authorise the Society to operate the account according to the instructions indicated on this application form.
9. I have read the section titled Privacy Notice and understand that the Society must process my personal information in order to provide a savings account.
10. I authorise you to hold my cash subscriptions, any other proceeds in respect of my ISA investments and any other cash.
11. I authorise you to make on my behalf any claims to relief from tax in respect of ISA investments.

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 application form and the terms and conditions on the account that you wish to open. You should do this before signing this application form.

If you do not understand any of the points, please ask us for further information. You are confirming receipt of the Product Summary Box.

_____ _____

Signature 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:			

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