

Application form to open a savings account

Please fill in this form in black ink and use BLOCK CAPITALS. Please check any pre-printed personal details and change and initial them if they are not correct.

For our use only: A/C No.

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Part 1 The account holder(s)

First account holder

Title (Mr, Mrs, Miss, Ms and so on): _____

First name(s): _____

Surname: _____

Date of birth: ____ / ____ / ____ Male Female

Permanent address*: _____

Postcode: _____

Phone no: Daytime _____ Evening _____

Mobile _____

Nationality: _____ Occupation: _____

E-mail address: _____

If you have lived at your current address for less than 3 years, please write your previous address below:

Previous address: _____

Postcode: _____

Please tick the box that applies:

Second account holder Trustee Nominee Executor Attorney

Title (Mr, Mrs, Miss, Ms and so on): _____

First name(s): _____

Surname: _____

Date of birth: ____ / ____ / ____ Male Female

Permanent address: _____

Postcode: _____

Phone no: Daytime _____ Evening _____

Mobile _____

Nationality: _____ Occupation: _____

E-mail address: _____

If you have lived at your current address for less than 3 years, please write your previous address below:

Previous address: _____

Postcode: _____

If you already have a savings or mortgage account with us, please write your account number(s) here:

First account holder

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Second account holder

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

*We will send all account correspondence to the address of the first account holder. If you would like us to send this correspondence to a different address, please let us know.

Part 2 The account you are opening

Please write the name of the account you are opening _____

How did you hear about this account? _____

Part 3 The amount you are investing

The minimum investment for this account is shown in the account leaflet. How much are you investing? £ _____

Part 4 Your withdrawal instructions

You only need to fill this part of the form in if you are opening your account in more than one name. How many signatures do you want to use to run the account? (Please see our 'Savings terms and conditions' leaflet). We need all signatures to run trustee accounts. Any one Both

Part 5 Your interest

How would you like us to pay your interest? (Please tick the box that applies)

Note: Some of the following interest payment options may not be available for some account types. Please refer to the account leaflet.

1. Add it to this account

2. Add it to another account with us (The account number you want us to add your interest to) _____

3. Send it to my bank

Name of bank: _____ Bank sort code: ____ - ____ - ____

Bank account number: _____ Account held in the name(s) of: _____

Part 6 Data protection

For information about how we use your personal information, please see our 'Savings terms and conditions' leaflet.

If you do not want us to contact you in the future about other products, services or offers, please tick the box opposite. First account holder Second account holder

Part 7 Important Information

This is our standard savings application upon which we intend to rely. For your own benefit and protection you should read the product leaflet, savings terms and conditions, interest rates and charges leaflet and this application form carefully before signing. If you do not understand any point please ask for further information.

Part 8 Your signature(s)

Please tick the box that applies:

- I/we have already made up my/our mind about the account I/we want and don't need further help or information.
- I/we have been given clear and appropriate information on the different types of savings and investment accounts to help me/us choose the right one for me/us.

First account holder's signature _____

Date: ____ / ____ / ____

Second account holder, trustee, nominee, executor or attorney's signature _____

Date: ____ / ____ / ____

Please turn over

Part 9 Gross interest (tax-free)

If you do not pay income tax, please fill in an HM Revenue & Customs R85 form if you want us to pay your interest with no tax taken off (gross interest). If you do not send us an R85 form, we will pay your interest with tax taken off (net interest).

Part 10 Charitable Assignment

Words printed in italics in this section of the application form are explained in the notes at the end.

1. Paragraphs 2 to 6, below, will apply to me unless I am an *exempt customer* at the time when the Society *opens my account*.
2. I agree with the Society that, if the right to any *windfall benefits* is granted to me after my *account is opened*, I will assign my *windfall benefits* to the *selected charity* unless, on the *conversion announcement date*, I am a borrowing member with a mortgage from the Society. If I have entered into any agreements binding me to the *previous terms*, but then ceased to hold shares in the Society, this agreement replaces those previous agreements, which will no longer apply.
3. I authorise the Society and the *successor* to pass any *windfall benefits* referred to in paragraph 2, above, direct to the *selected charity* (or to any other registered charity which the *selected charity* may nominate to receive those benefits), without notice to me.
4. I understand that:
 - the Society has promised to transfer to the *selected charity* the benefit of the agreement which I have given under paragraph 2, above;
 - neither the Society nor the *selected charity* will release me from that agreement; and
 - any power of the Society to change the terms of its contract with me will not apply to any of the terms set out in this section of the application form.
5. I authorise the Society to give the *selected charity* any information about me or any account which I have with the Society (now or in the future) - but only if the *selected charity* reasonably needs it regarding the agreement I have given under paragraph 2, above.
6. I understand that the Society will require anyone who becomes a shareholding member (who is not then an *exempt customer*) to agree to assign to charity the right to any *windfall benefits* which that person may become entitled to. The terms of the agreement will be decided by the Society and may be different from the *current terms*. This paragraph will no longer apply if the Society publishes a notice in the press of a decision by the Society that it will no longer require new shareholding members to enter into such agreements.

Notes

These notes apply to paragraphs 1 to 6, above:

- (a) Your "*account*" is the share account which you are applying to *open* by completing this form.
- (b) The "*conversion announcement date*" means the date on which the Society makes a public announcement of a proposal to transfer its business to a *successor*.
- (c) The "*current terms*" means terms which are the same as, or similar to, the terms set out in paragraphs 2 to 5, above.

- (d) You are an "*exempt customer*" when you open the *account* if:
 - you have held shares in the Society (other than permanent interest bearing shares) at all times since before 30 January 1999; or
 - you are a borrowing member with a mortgage from the Society; or
 - you have already entered into an agreement with the Society binding you to the *previous terms* and have continued to hold shares in the Society (other than permanent interest bearing shares) at all times since the account for which you were then applying was *opened*; or
 - you belong, in respect of the *account*, to one of the groups of other people who, in the Society's opinion, do not need to be asked to agree to the *current terms*. A list of these groups is available from the Society at any time. The Society may alter the number and composition of the groups from time to time, but no alteration will apply retrospectively.
- (e) You "*open*" an account either by opening a new account or by having an existing account transferred into your name (whether as sole or joint holder).
- (f) The "*previous terms*" means the terms of the agreement headed "Charitable Assignment" contained in the share application forms used by the Society between 30 January 1999 and 5 April 2000.
- (g) The "*selected charity*" means the Charities Aid Foundation or, if it is at any time no longer a registered charity, any other registered charity or registered charities selected by it to receive assignments of *windfall benefits*.
- (h) The "*successor*" is any company or other corporate body to which the Society transfers its business under section 97 of the Building Societies Act 1986 (or under any provision which amends or replaces it).
- (i) A "*windfall benefit*" is a benefit which a person has the right to receive, as a shareholding member of the Society, under the terms of any future transfer of the Society's business to a *successor* (i.e., on a conversion or take-over) other than:
 - the replacement of savings in a share account with the Society with savings in a deposit account with the *successor*; or
 - any benefit which the Society has decided may be kept by a person in respect of some or all of his/her accounts. A list setting out the conditions which determine whether, and to what extent, any benefit may be kept is available from the Society at any time. These conditions may be altered by the Society from time to time, but no alteration will apply retrospectively.
- (j) Where more than one of you is signing this form, paragraph 1 and (if applicable) paragraphs 2 to 6, above, apply to each of you separately (though the effect of paragraph 2 may be different, depending on who is the first-named holder of the *account* when the right to any *windfall benefits* arises).
- (k) If the Society no longer exists following a merger with another building society, paragraphs 2 to 6, above, will still apply between you and the other society.

Part 11 Declaration

1. I am investing the amount shown on this form in Nottingham Building Society just for my benefit as the owner. Or, I am investing the amount shown on this form just for my benefit and the benefit of the other joint owners. Or, I am investing the amount shown on this form as a trustee, nominee, executor or attorney.
2. The total amount I have invested in the Society, including the amount I am investing now and the total amounts in any other accounts where I am named as an individual, joint, trustee, nominee or executor holder, is not more than £250,000.
3. I will not invest any extra amounts that would increase the total amount I have invested as an individual, joint, trustee, nominee or executor holder in the Society to more than £250,000.
4. This investment is not being made on behalf of a corporate body, a trustee for a corporate body, or a partnership where one or more partners is a corporate body.
5. I agree (if I am a joint account holder) to the order in which the account holders' names will appear in the Society's records. I understand that this is important, since only the first account holder has voting and other rights as a "representative joint holder" under the Society's Rules, and the account balance is treated as belonging to him/her alone for the purposes of the Charitable Assignment set out above.

For our use only

Transfer from account number	<input type="text"/>	First holder address ID	<input type="text"/>
Date account opened	<input type="text"/>		Second holder address ID
First holder customer no	<input type="text"/>	Personal identity ID	<input type="text"/>
Second holder customer no	<input type="text"/>	Other ID	<input type="text"/>