

# Share Account Application

## or Additional Applicant to existing account

### 1. Initial Investment

You must specify the account you wish to invest in before proceeding any further. All investors should fill in their details. If your application has more than 2 investors please complete an additional application form (indicating that this is for the 3rd and 4th applicants) and attach with this application.

I/We enclose  £

(please make cheques payable to the account holder)

To be invested in

(Account name)

Joint Accounts - If an account is held in more than one person's name, then only the holder whose name appears first in our records will be entitled to membership rights (such as the right to receive notices of, and to attend and vote at meetings). This is subject to any rights given to other holders by any legislation.

### 2. Personal Details

#### 1st Applicant

Surname

Title  Mr  Mrs  Miss  Ms  Other

Forename(s) in full

Home telephone

Work telephone

Mobile Number

Email

Preferred correspondence  Email  Post  Phone

Preferred contact time  AM  PM

Permanent address

Postcode

Date of birth

Marital status

Occupation

Are you related to any other customer at the Society?  Yes  No

Relationship

#### 2nd Applicant

Surname

Title  Mr  Mrs  Miss  Ms  Other

Forename(s) in full

Home telephone

Work telephone

Mobile Number

Email

Preferred correspondence  Email  Post  Phone

Preferred contact time  AM  PM

Permanent address

Postcode

Date of birth

Marital status

Occupation

Are you related to any other customer at the Society?  Yes  No

Relationship

Please complete this section if you are to be second named on a joint account or trustee.

Joint  Trustee

Mr  Mrs  Miss  Ms  Other

Email  Post  Phone

AM  PM

Postcode

Yes  No

### 3. Tax Liabilities

#### 1st Applicant

Nationality

Are you a US Citizen?

If 'yes' please provide your US Tax Identification No. (TIN)

Are you resident for tax purposes anywhere other than the UK?  Yes  No

If 'yes' please list all the countries of which you are tax resident and provide your relevant tax reference or Taxpayer Identification No. (or functional equivalent).

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|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
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| <input type="text"/> | <input type="text"/> |

#### 2nd Applicant

Nationality

Are you a US Citizen?

If 'yes' please provide your US Tax Identification No. (TIN)

Are you resident for tax purposes anywhere other than the UK?  Yes  No

If 'yes' please list all the countries of which you are tax resident and provide your relevant tax reference or Taxpayer Identification No. (or functional equivalent).

|                      |                      |
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| <input type="text"/> | <input type="text"/> |

The UK government has, and will be signing, a number of inter-governmental agreements to share tax information, where applicable, with the tax authorities in other jurisdictions. The requirement to collect certain information about each customer's tax arrangement is part of UK legislation and as a financial services company we are legally obliged to collect it. We are asking for your tax residency and tax ID numbers (where applicable) and will record this on our records now, but will only disclose this information to the relevant tax authorities if and when we are required to under UK law.

Your tax residence generally is the country in which you live for more than half a year and where you pay income tax. Special circumstances (such as studying abroad, working overseas, or extended travel) may cause you to be resident elsewhere or resident in more than one country at the same time (dual residency).

As a financial institution we are not allowed to give tax advice. If you have any questions on how to complete this form we recommend you speak to your tax authority (HMRC in the UK) or your tax or legal adviser.

