

Application to add a Third Party Mandate

This form can be completed electronically then saved and printed. If completing manually, please complete in black ink and BLOCK CAPITALS. If you need any help completing this form, please call us on 01257 235003 or visit your local branch.

1. Personal Details Existing Account holder 1 deta	ails	2nd Account Holder (Only to be	completed for joint accounts)		
Surname		Surname			
Title	Mr Mrs Miss Ms Other	Title	Mr Mrs Miss Ms Other		
Forename(s) in full		Forename(s) in full			
Home telephone		Home telephone			
Mobile Number		Mobile Number			
Email address		Email address			
Permanent Residential Address		Permanent Residential Address			
	Postcode		Postcode		
Date of birth	D D M M Y Y Y	Date of birth	D D M M Y Y Y		
2. Keeping You Up To Date About Our Products and Services					
From time-to-time Chorley Building Society would like to provide you with information on our products and services, offers and promotions which we believe may be of interest to you. Please tick the boxes to tell us all the ways you would prefer to hear from us:					
Existing Account Holder 1	Email Text Message Phone	Post I do not wis	h to receive any marketing communications		
xisting Account Holder 2 Email Text Message Phone Post I do not wish to receive any marketing communications					
You can opt out of marketing or change your preferences at any time by following the instructions in each communication. For more information, please refer to our privacy policy.					
3. Current employment status					
Existing Account Holder 1					
Employed	Self employed Retired Stude	ent Homemaker	Unemployed Other		
Occupation					
Annual Income	£0-£24,999 £25,000-£49,999	£50,000 - £74,999			
	£75,000 - £149,999 £150,000 - £299,999	£300,000 +			
Existing Account Holder 2					
Employed	Self employed Retired Stude	ent Homemaker	Unemployed Other		
Occupation					
Annual Income	£0 - £24,999 £25,000 - £49,999	£50,000 - £74,999			
	£75,000 - £149,999 £150,000 - £299,999	£300,000 +			
4a. What type of third party are you applying for?					
Savers Account Operator Young Savers Account Operator CTF / JISA Registered Contact					
Refer to the Third Party Mandate Explained document which can be found on our website or requested in branch.					



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Accounts to which third party is to be added					
Account Name	Account Number				
Account Name	Second account no	Second account number (if applicable)			
Account Name	Third account number (if applicable)				
Account Name	Fourth account number (if applicable)				
4b. Third Party details					
	Address				
Title Mrs Miss Ms	Address				
Other					
Forename/s in full		Postcode			
Surname	Relationship to account holder				
	account noider				
Date of birth D D M M Y Y Y Y	Signature of third party				
Telephone					
Email address	Date	D D M M Y Y Y			
The proposed Third Party Mandate holder should return this form to Chorley Building Society together with the required forms of identification. Please refer to the Society's Identification Criteria which is available in branch or at www.chorleybs.co.uk					
I/We hereby authorise and request Chorley Building Society to permit the person detailed in section 4B of this form to operate my/ our accounts (as listed above). I/We understand that a person with a Third Party Mandate has the authorisation to be given information regarding the account(s) I/We further understand that the Third Party Mandate holder's signature shall be a complete and binding discharge and I/we agree that this authority shall remain in force until receipt of your acknowledgement of any notice of revocation given by me/us.					
Account holders to sign:					
Account Holder 1	Account Holder 2				
Date D D M M Y Y Y	Date	D D M M Y Y Y			
Your Personal Information and what we do with it					
Chorley and District Building Society is the Data Controller of any personal data you supply. The information you provide, we obtain through our dealings with you or about your account will be held on the Society's computers and in other records. We may use and share your personal information to help us provide the services you are applying for and to conduct an electronic search on you via the services of external agencies in order to confirm your identity and comply with money laundering regulations. Under relevant data protection laws, you have a number of rights including the right to see and receive a copy of information held about you on our records and to ask for any inaccurate details to be corrected. For more details of how we will use and share your personal information, and about your rights, please read our Privacy Notice on our website at www.chorleybs.co.uk/privacy If you have any questions about the relevant data protection laws or your rights under them, please write to the Data Protection Officer, Chorley Building Society, Key House, Foxhole Road, Chorley, Lancashire PR7 1NZ or by email to DPO@chorleybs.co.uk					
STAFF USE ONLY					
Customer Advisor DDDM	MYY				
Customer Number of Account Holder of third party	er				
Scanned to N Drive Yes No QA check has					