

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 details

Surname

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Forename(s) in full

Home telephone

Mobile Number

Email address

Permanent Residential Address

Postcode

Date of birth

2nd Account Holder (Only to be completed for joint accounts)

Surname

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Forename(s) in full

Home telephone

Mobile Number

Email address

Permanent Residential Address

Postcode

Date of birth

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 wish to receive any marketing communications ☐

Existing 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 ☐ Student ☐ 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 ☐ Student ☐ 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.

