

For office use only:	$\neg \Box \Box$		
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Regular Saver Share Account Application

This form can be completed electronically, saved and printed.

If completing manually, please complete in black ink and BLOCK CAPITALS. Complete all boxes that apply.

1. Initial Investment You must specify the account	you wish to invest in before proceeding any further.	
Type of Regular Saver account applied for		Purpose of account (e.g. saving for a home or holiday, etc)
Initial investment (please make cheques payable to the account holder)		Origin of funds (e.g. salary, inheritance, etc)
to the account holder)		How much do you anticipate saving into this account over the next 12 months?
		the next 12 months?
2. Personal Details		
Title (Mr/Mrs/Miss/Ms/Other)		
Name		
Address		
	Postcode	
Home Telephone	Tostcode	_ _
Work Telephone		
Mobile Number		
Email		
	@	
Preferred correspondence	Email Post Phone	
Preferred contact time	AMPM	
Date of birth		
3. Current employment sta	atuo.	
3. Guirent employment sta	itus	
Employed	Self employed Retired Stu	dent Homemaker Unemployed Other
Occupation		
Annual Income	£0 - £24,999 £25,000 - £49,999	£50,000 - £74,999
	£75,000 - £149,999 £150,000 - £299,9	£300,000 +



A Tay Liabilities

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Tax Elabilities					
Nationality					
Are you a US Citizen?	Yes No				
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).					
requirement to collect certain informa are asking for your tax residency and and when we are required to under Uk Your tax residence generally is the co overseas, or extended travel) may cat	ation about each customer I tax ID numbers (where app K law. ountry in which you live for I use you to be resident else	r's tax arrangement is part o blicable) and will record this more than half a year and w where or resident in more th	o share tax information, where applicable of UK legislation and as a financial servi- on our records now, but will only disclothere you pay income tax. Special circurtian one country at the same time (dual how to complete this form we recomm	ces company we are legally obliged se this information to the relevant t mstances (such as studying abroac residency).	d to collect it. We tax authorities if d, working
Account Name:	nditions for interest paymer	Ac.	ccount you are applying for. count Number:	account holders name	
			Society's identification criteria. The Sc st original documentary proof to suppor		identification
	nd you information about of t of your interests, fundam s information by Email and	other products and services ental rights and freedoms.	s we offer by post. We will only do this More information can be found in our p to receive such material by		mate interest
			re (i.e. as a politician, councillor or judg does or did hold one of these positions?		No
If Yes, please provide further details					
9. Your Personal Information and	d 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



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10. Agreement to Assign Windfalls to Charity

If you had a share account or mortgage account with the Society on 22nd March 2000 and have maintained an open share account or mortgage account since that date, the wording in paragraphs 1 to 3 below does not apply to you, however, it must not be deleted.

- 1. By applying to open a share account on or after 23rd March 2000 I agree with the Society and the Charities Aid Foundation ("the CAF") that I will assign to the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 22nd March 2000 between the Society and the CAF, in which case references to the CAF shall include references to any other charity(ies), but to no other person) the rights to any relevant conversion benefits (defined below). This obligation will not apply to me/us if I/we fall within any class of person's, which, as at today's date, the Society wishes to be excluded from such obligation. This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me/us. I/we understand that neither the Society nor the CAF will release me from this agreement or vary its terms and (except as set out in paragraph 2 below) I will continue to be bound by the above condition even if the Society decides at some time in the future (and announces any such decision by press release) that it is no longer in the best interests of the Society to continue with the above assignment condition generally in respect of
- 2. (a) "Relevant conversion benefits" means any benefits to which I might become entitled as a shareholding member of the Society under the terms of any future transfer of the Society's business to a company (ie on a conversion or takeover) which is completed at any time within the seven years immediately following the date on which my share account is opened (or, if applicable, the shorter period as set out in the list available from the Society's Secretary). "Relevant conversion benefits" does not include the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company on a conversion or takeover.

 (b) If the Society merges with any other society, after the date of such merger the "Society" includes such other society.
- 3. I/we understand that the Society will pass to the CAF such information relating to me/us and my/our accounts with the Society as the CAF may reasonably require in order to administer this agreement to assign and the relevant conversion benefits and for no other purpose.

 A list of the classes of persons which the Society currently wishes to be excluded from the obligation to assign or in respect of which a shorter period applies (this list may change

from time to time but not with retrospective effect) is available on request from any Branch of the Society or the Society's Secretary at its principal office.
11. Life Planning We work closely with Accord Legal Services, who provide a Will writing and estate planning service, ensuring your assets and loved ones are protected in the best way. If you would like to be contacted by Accord Legal Services please tick here alternatively visit our website www.chorleybs.co.uk/life-planning We also work closely with PG Mutual, who provide Income Protection Insurance to cover income, if you found yourself unable to work due to illness or accident and unable to meet your financial commitments. If you would like to be contacted by PG Mutual please tick here Alternatively you can get a quotation for this cover via our website www.chorleybs.co.uk/life-planning.
1/We the person(s) whose signature(s) appear on this form declare that: Any share(s) acquired by me/us under this account will not be held by me/us as a bare trustee for a body corporate, or for persons who include a body corporate. I/We have read a copy of the last published Summary Financial Statement. Copies are available on request or can be downloaded from our website www.chorleybs.co.uk. I/We have read a copy of and agree to be bound by the Society's Memorandum of Rules. Copies are available on request or from our website www.chorleybs.co.uk. I/We agree to be bound by the conditions relating to the Agreement to Assign Windfalls to Charity as described above. I/We confirm this information is correct and I/we understand that I/we may request in writing a copy of the details which are held about me/us on the Society's records. I/We have read the Society's Privacy Notice which describes the way my/our personal information will be processed. I/We acknowledge that the information contained in this form and information regarding reportable account(s) may be provided to the tax authorities of the country in which this account(s) is/are maintained and exchanged with tax authorities of another country or countries in which I/we may be tax resident pursuant to intergovernmental agreements to exchange financial account information I/We acknowledge receipt of the FSCS information sheet I/We undertake to advise Chorley Building Society within 30 days of any change in circumstances which affects my/our tax residency status or causes information contained herein to become incorrect, and to provide Chorley Building Society with a suitably updated self-certification and declaration within 30 days of such change in circumstances.
If you do not understand any point within the application, please ask for further information.
Signature Date D D M M Y Y Y
If you are not the account holder, please indicate the capacity to which you are signing the form. If you are a Power of Attorney please also attach the certified copy of the power of attorney.
STAFF USE ONLY
Customer Advisor Passbook Number D D M M Y Y Date Opened
Is the account eligible under FSCS? Yes No SCV ineligible indicator recorded?