

# Fixed Rate Bond Application Form

**BUCKINGHAMSHIRE  
BUILDING SOCIETY**



Established in 1907 at Chalfont St. Giles

helping you to build a better future

www.bucksbuildingsociety.co.uk

## E Agreement to Assign Windfalls to Charity please read this section

**Note: This Agreement does not apply to you if (i) you have held shares in the Society at all times since 26th April 2000 or (ii) you are a borrowing member of the Society or (iii) you are, in respect of the account for which you are now applying, in one of the other groups of people that the Society has decided should be exempt\*. Where more than one of you is signing this form the above Note and, if applicable, the rest of this Agreement apply to each of you separately.**

1. I agree with the Society that I will assign to the **selected charity** my right to receive any **windfall benefits**. I authorise the Society and any **successor** to pass any **windfall benefits** direct to the **selected charity** (or to any other charity which the **selected charity** may nominate) without giving any notice to me. I understand that the **selected charity** will have the benefit of this Agreement, and that neither it nor the Society will release me from it or vary its terms, even if the Society decides at some stage in the future that new shareholding members generally will not be required to enter into similar agreements. I authorise the Society to give the **selected charity**

any information about me and any account that I have with the Society (either now or in the future) but only if the **selected charity** reasonably needs it for any purpose arising out of this Agreement. I understand that if the Society no longer exists following a merger with another building society, this Agreement will still apply between me and the other society.

2. In this Agreement:

- (a) "**selected charity**" means the Charities Aid Foundation or, if it ceases to be registered as a charity, any other registered charity selected by it;
- (b) "**windfall benefits**" means any benefits which I may become entitled to 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 takeover). The expression "**windfall benefits**" does not include (i) the right to have savings in a share account with the Society replaced by savings in a deposit account with the **successor** or (ii) if I am in one of the groups of people that the Society has decided may keep some or all benefits\*, those benefits which the Society has decided I may

keep or (iii) any benefits conferred under the terms of any future transfer of the Society's business to a **successor** which is publicly announced more than three years after the Society has published a notice in the press publicising a decision by the Society either (a) that it will no longer require new shareholding members to enter into agreements to assign benefits to charity or (b) that new shareholding members' agreements will only require them to assign benefits to charity if an event relating to a transfer of the Society's business to a **successor** occurs during a fixed term specified in their agreements; and

- (c) "**successor**" means 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). \*Details of these groups and (where applicable) the benefits that may be kept are available from the Society. The number and composition of the groups may be changed from time to time but no change will apply retrospectively.

## F Customer Declaration please read this section and sign

### Declaration for this account

- (i) I/We agree to be bound by the conditions of issue of this account, and the Rules of the Society.
- (ii) I/We hereby declare that I am/we are not a bare trustee (or in Scotland, a simple trustee) for a body corporate, or for persons who include a body corporate.
- (iii) I/We declare that I/we have received and read the Society's "Essential Information for Investors" leaflet.
- (iv) I/We understand that you are required by law to check the identity and address details of all new account holders. A list of appropriate evidence of identity is contained in the Essential Information for Investors leaflet.
- (v) I/We hereby declare that this amount is being invested in the Buckinghamshire Building Society by me/us as sole/joint beneficial owner(s).

### Do you have any existing Buckinghamshire Building Society accounts?

1st Applicant Yes  No

If yes, please provide relevant account numbers     -       -

2nd Applicant Yes  No

If yes, please provide relevant account numbers     -       -

**IMPORTANT** – Where there is more than one investor, this form must be signed by each of the joint investors. Please read the Agreement to Assign Windfalls to Charity (section E) and the Customer Declaration (section F) before signing.

Applicant 1

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Signature Date

Applicant 2

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Signature Date

