

Chiltern Gold Builder

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

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

Do you have any existing Buckinghamshire Building Society accounts?

Yes No

If yes, please provide relevant account numbers

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IMPORTANT – Please read the Agreement to Assign Windfalls to Charity (section E) and the Customer Declaration (section F) before signing.

Signature

Date

/ /

Chiltern Gold Builder

Application Form



All Account Applicants

Thank you for choosing a Buckinghamshire Building Society Account. In conjunction with this leaflet you will need to read and understand the appropriate account leaflet and the Society's leaflet "Essential Information for Investors" which contains the Society's Terms and Conditions and other important information. If you have not received either of these leaflets, please contact us on 0800 652 6725 and we will send them to you.

We use an electronic identification verification system to verify your identity. This verifies your identity by searching data at a credit reference agency and the databases they have access to, including the Electoral Register. This only checks your name and address and does not affect your creditworthiness and the agency will keep a record of the search whether or not your application proceeds.

Electronic verification is undertaken for most customers but unfortunately it is not always possible to verify someone via this method due to an insufficient quality of data available. In this case we would need you to provide paper identification documents. Under 18's should send in appropriate ID documentation. See the Essential Information for Investors leaflet for details.

When applying for this account, it is important that:

- 1) you sign section F
- 2) you read and understand the "Assignment of Windfalls to Charity" (E) overleaf and the "Data Protection Act 1998" (C)
- 3) you complete sections "A", "B", and "F".
- 4) you send back the completed form and your cheque for the first month to:

Buckinghamshire Building Society, FREEPOST,
High Street, Chalfont St Giles, Bucks HP8 4BR.

Any queries Freephone 0800 652 6725

For office use only

Account opened: In Person

Post

Cashier

Book No.

A/C No.

A Investment Interest & Withdrawal Details please fill in all the relevant details

I wish to subscribe the regular monthly sum (including initial investment) of £ in the Chiltern Gold Builder account in accordance with the published prospectus.

I enclose a cheque for £ for the initial investment. Interest will be paid annually at 31st December into the account.

I confirm that including this new investment my total holding in the Society does not exceed £250,000. Investments above this amount are by arrangement.

B Applicant(s) Details please complete this section in block capitals

Title (Mr/Mrs/Miss/Ms/Other):

Date of birth:

Surname:

Forename(s) in full:

Permanent address:

Post Code:

Nationality:

Country of birth:

Occupation:

Contact Tel (daytime):

Email address:

C Data Protection Act 1998 please read this section

The data we will hold is to enable us to administer your account and for marketing purposes. It will not be released to a third party. From time to time the Society contacts its members to provide details of new or third party products and services which it is offering

If you do not wish to receive such information please tick box We will remind you of your right not to receive marketing information every 3 years.

You have a right to receive a copy of the information we hold about you if you apply to us in writing. A fee will be payable.

D Tax

Are you a taxpayer?

Applicant

 Yes No

Beneficiary

 Yes No

If no, have you completed a HM Revenue and Customs registration form (R85)?

 Yes No Yes No