

# Monthly Income Fixed Rate Cash ISA Bond

## Application Form



**BUCKINGHAMSHIRE  
BUILDING SOCIETY**

Established in 1907 at Chalfont St. Giles

helping you to build a better future

[www.bucksbuildingsociety.co.uk](http://www.bucksbuildingsociety.co.uk)

### **D 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 take-over). 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.

### **E Customer Declaration** Please read and sign this section

I apply to subscribe for:

3 Year / 4 Year Monthly Income Fixed Rate ISA Bond (delete as applicable)

for the tax year 20...../20..... and each subsequent year until further notice.

**I Declare that:**

All subscriptions made, and to be made, belong to me;

I am 16 years of age or over;

I have not subscribed and will not subscribe to another cash ISA in the same year that I subscribe to this cash ISA; and

I have not subscribed and will not subscribe more than £7,200 in total to a cash ISA and a stocks and shares ISA in the same tax year;

I have not subscribed and will not subscribe more than £3,600 of the overall £7,200 total to a cash ISA;

I am resident and ordinarily resident in the United Kingdom for tax purposes, or if not so resident, either perform duties which, by virtue of section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Buckinghamshire Building Society if I cease to be so resident and ordinarily resident or to perform such duties or to be married to, or in a civil partnership with, a person who performs such duties.

#### **I authorise Buckinghamshire Building Society:**

To hold my cash subscription, ISA investments, interest, dividend and any other rights or proceeds in respect of those investments and any other cash;

To make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.

I declare that this application form has been completed to the best of my knowledge and belief.

Please read the Agreement to Assign Windfalls to Charity (section D) and the Investment Details (section B) before signing.

I agree to be bound by the conditions detailed in sections B, D and E of this leaflet.

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

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Thank you for choosing a Buckinghamshire Building Society cash ISA. In conjunction with this leaflet you will need to read and understand the Society's leaflet "Essential Information for Investors" containing identification requirements and other important information.

If you have not received this leaflet, please contact us on 01494 879500, and we will send it to you.

1.

When applying for this cash ISA, it is important that:

2. You read and understand the "Assignment of Windfalls to Charity" (D), the "Data Protection Act 1998" (C) and the Customer Declaration (E).
- 3.
4. Section E MUST be signed by the applicant.

You complete sections A, B and E.

You send back the completed form along with relevant customer identification (if required) and your remittance to:

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

For more information on the Society or any of our other products, please visit our website:

[www.bucksbuildingsociety.co.uk](http://www.bucksbuildingsociety.co.uk)

### For office use only

Account opened: In Person  Post  Cashier

Book no.

A/C no.

### A Application Details

Please fill in this section

Title (Mr/Mrs/Miss/Ms):

Surname:

Forename(s) in full:

Date of Birth:

Nationality:

Country of Birth:

Permanent Residential Address:

Post Code:

Occupation:

Contact Tel (daytime):

E-mail address:

### B Investment and Interest Details

Please read and fill in this section

I wish to apply for:  3 Year monthly Income Fixed Rate Monthly Income Cash ISA Bond (please tick relevant box)  4 Year monthly Income Fixed Rate Monthly Income Cash ISA Bond (minimum balance £100)

I hereby apply for a Buckinghamshire Building Society cash ISA in accordance with the published prospectus. I confirm that, including this investment, my total holding with the Society does not exceed £250,000.

I wish to invest £

My existing account number is:

Do you have a National Insurance Number? Yes  No

If yes, please enter here

NOTE: You should be able to find your National Insurance Number on a payslip, form P45 or P60, a letter from the Inland Revenue, a letter from the DWP or pension order book.

I require the interest to be sent monthly to the following bank:

a/c no.

Sort Code

payee a/c name

- i) I understand that I will become a Member of the Society and be bound by its rules in force from time to time.
- ii) I declare that I have received and read the Society's "Essential Information for Investors" leaflet.
- iii) I 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.

### 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.