

ISA APPLICATION FORM



Melton Building Society accounts are only available for UK residents. Please use this application form to apply for individual savings account (ISA), alternative application forms are available on request for savings, children's, business or trust accounts.

I/we would like to make an initial deposit of £ into a account

I/we will make this deposit by bank transfer/cheque/cash/other (please specify)

Cheques should be made payable in the name of the account holder(s), please do not post cash.

Personal details (please use block capitals)

Title Forename(s)
 Surname

Mother's maiden name (for security purposes) Date of birth

Nationality(s) National Insurance Number

Residential address

 Postcode

Daytime telephone number Home telephone number

Occupation Industry/sector e.g. Financial Services

Email address

Nominated current account

Name of account holder

Bank account number

Sort code

Bank name and address

Postcode

About your account

Please complete the information below to tell us how you will be using your account.

I apply to subscribe for a Cash ISA for the tax year: - and each subsequent year until further notice.

I/we expect to use the account for: regular saving/specific purpose/other (please specify)

What is the source of the money you will be using to fund your account?

i.e. savings with another provider, inheritance, proceeds from a property sale, other (please specify)

How many transactions do you expect to do each month? Less than 5 Between 5-20 More than 20

Supporting our Members

We understand there are many reasons you might need a little extra help or support when it comes to managing your money. We look at each customer's situation individually and, when extra support is needed, we aim to work with you to understand your additional needs and how we can support you.

If you would like to tell us about any extra support you may need, please tick this box.
We will then contact you to discuss how we may be able to support you.

Marketing preferences

We would like to keep in touch with you about carefully selected products, services and offers that may be of interest to you. If you agree to Melton Building Society contacting you for these marketing purposes, please tick all that apply:

Email Text Post Phone

You can withdraw your consent at any time, simply visit your local branch, call us on 01664 414141 or you can do this via your online account.

Contact preferences

If you do not consent to marketing, we will still contact you periodically about the account(s) you hold with us. These messages will only ever be service related and will help you to manage your accounts. I would like Melton Building Society to contact me for service related purposes via:

Email Text Post Phone

Wherever possible we will use your preferred contact preference, however there may be occasions where we will need to use a different method. You can update these preferences at any time, simply visit your local branch, call us on 01664 414141 or you can do this via your online account.

Declaration by saver

I declare that:

1. All subscriptions made, and to be made, belong to me;
2. I am 18 years of age or over;
3. I have not subscribed and will not subscribe more than the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year;
4. I have not subscribed and will not subscribe more than the cash ISA subscription limit to one cash ISA;
5. I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA;
6. I am 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 & 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 the Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
7. This investment will not be held by me as trustee for a body corporate, or for persons who include a body corporate.
8. I understand that ISA investments will be and must remain in my beneficial ownership and must not be used as security for a loan.
9. I will abide by the Rules of the Society and the terms and conditions relating to the Society's Cash ISA.

I authorise Melton Building Society

1. To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
2. To make on my behalf any claims to relief from tax in respect of ISA investments.

Please read carefully before signing. By signing this application you are confirming your agreement and acceptance of the following. I/we:

- agree to be bound by the Rules of the Society (a copy is available on request), the Terms and Conditions for the account and the General Terms and Conditions for Savings Accounts
- have received a copy of the Charitable Assignment
- have received a copy of the Privacy Notice which details how personal data will be processed, used and retained by Melton Building Society
- have received a copy of the Financial Services Compensation Scheme leaflet
- confirm that all information provided on this application is accurate and true to the best of my knowledge

If there is anything above that you do not understand, please speak to us for further assistance.

Name (block capitals)

Signature

Date

Office use only	A/C number	Party ID
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