

# SAVINGS APPLICATION FORM



Melton Building Society accounts are only available for UK residents. Please use this application form to apply for a personal savings account, alternative application forms are available on request for ISAs, 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.**

Where you are able to choose how you receive interest please select: Annual  Monthly

## Personal details (please use block capitals) Applicant A

Title  Forename(s)

Surname

Mother's maiden name (for security purposes)

Country of residence (for tax purposes)

Do you have a Tax Identification Number for another country?  
 YES  NO  If yes, country and number

National Insurance Number  Date of birth

Nationality(s)

Residential address

Postcode

Occupation  Industry/sector e.g. Financial Services

Daytime telephone number  Home telephone number

Email address

## Personal details (please use block capitals) Applicant B

Title  Forename(s)

Surname

Mother's maiden name (for security purposes)

Country of residence (for tax purposes)

Do you have a Tax Identification Number for another country?  
 YES  NO  If yes, country and number

National Insurance Number  Date of birth

Nationality(s)

Residential address

Postcode

Occupation  Industry/sector e.g. Financial Services

Daytime telephone number  Home telephone number

Email address

## Nominated current account

Applicant A must be the first account holder of the nominated 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/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

## Operating instructions

Where the account has more than one account holder, please tell us how many of those account holders you wish to sign to make a withdrawal:

All to sign  Anyone to sign

## Interest instructions

Please let us know where you would like the interest earned from this account to be paid:

Please transfer to my existing Melton Building Society account number

Please credit the interest earned to this account

Please transfer to my nominated current account

## 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: Applicant A  Applicant B  Text: Applicant A  Applicant B   
Post: Applicant A  Applicant B  Phone: Applicant A  Applicant B

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: Applicant A  Applicant B  Text: Applicant A  Applicant B   
Post: Applicant A  Applicant B  Phone: Applicant A  Applicant B

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.

## Additional information

If you plan to register for our online portal and you are applying for a joint account, please ensure that each account holder has their own email address and telephone number.

## Declaration by saver

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.**

## Applicant A

Signed

Print name

Date

## Applicant B

Signed

Print name

Date

Office use only	A/C number	Party ID
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