

# Cash ISA for tax year 2024/25

## Application form

Start here ↓

Do you have a savings account or mortgage with us?  No  Yes

Account number

### 1. About your proposed Investment

ISA name and issue number:  
for example **Fixed Rate ISA – Issue 6**

Amount to open your  
ISA **£**

Make your cheque payable to 'Principality re: [insert your name here]' and attach it to the bottom of the page overleaf.

Source of this money  
for example: savings,  
inheritance, salary etc

### 2. About you

Title  Mr  Mrs  Miss  Ms  Other

Surname

All other names  
in full

Date of birth

Nationality

Occupation

National Insurance (NI) number:

You can find your National Insurance number:

- online through your personal tax account
- in the HMRC app
- in any documents you already have, for example, a payslip, P45 or P60

Tick here if you don't have an NI number

Full address – we **do not** accept a PO Box or 'care of' address

Length of time  
at this address  years  months

If less than **three** years at your current address please provide us with your previous addresses, and length of time at each address, on a separate sheet.

Phone

Home (include  
area code)

Work (include  
area code)

Mobile

Email address

### Questions?

☎ 0330 333 4000\*

📄 principality.co.uk

🏠 principality.co.uk/branch

### 3. How would you like interest to be paid?

Before completing this section please refer to your chosen product's Account Terms.

Is the interest on the ISA you are opening paid

Annually – fill in **1, 2** or **3** below  Monthly – fill in **2** or **3** below

1)  Added to your ISA annually

2)  Into Principality Account number:

3)  Into the following bank/building society account:

Bank/building  
society name

Sort code

Account number

Account held in  
the name(s) of

Reference  
number  
(if applicable)

### 4. Where did you hear about this account

Branch advertising

Principality website

Mailing

Online advertising

Press

Other

Please quote promotional code, if you have one:

### About your ISA allowance

The ISA limit for the 2024/25 tax year is £20,000. You can choose to invest your allowance in any combination of permitted ISAs.

Continue over next page →

## 5. Declaration and signature

Before you sign this application please make sure you have read the terms and conditions of this Cash ISA as you will be bound by them. If you do not understand any of them please contact us for further information. If false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention agencies to prevent fraud and money laundering. Further details explaining how the information held by fraud prevention agencies may be used can be obtained by contacting us at the address in Section 6. Please check that you've answered all the questions that apply to you.

I confirm that I have received and will be bound by the following:

- Account terms for this ISA
- Our Savings Terms and Conditions booklet
- The 'Your Information' leaflet about the data protection legislation and how Principality may use my personal information
- Basic information about the protection of your eligible deposits

### I declare that:

- This application form has been completed to the best of my knowledge and belief.
- All subscriptions made, and to be made, belong to me
- I am 18 years of age or over
- I have not subscribed, and will not subscribe, to more than the overall ISA subscription limit total in the same tax year.
- 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 civil partnership with, a person who performs such duties. I will inform Principality 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.
- I agree to the ISA terms and conditions.

### I authorise Principality Building Society to:

- 1) Hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
- 2) Make on my behalf any claims to relief from tax in respect of ISA investments.

I apply to subscribe to this Cash ISA for the tax year 2024/25 and each subsequent year until further notice; and I agree to the ISA Account Terms and Savings Terms and Conditions.

### Agreement to assign windfalls to charity

If you are already a Principality Member please go to the signature box below. If you are not a Principality Member please read the following, which will apply to you when you open your ISA:

Note: This Agreement does not apply to you if you have been a continuous Member with the Principality since any date before 6th June 2000.

By applying to open this Account, I agree with Principality and the Charities Aid Foundation ('CAF') that I will assign to CAF (or to any charities nominated by it, but to no other person) the rights to any Conversion Benefits to which I may become entitled during the first seven continuous years of being a Member or any shorter period for which I am a Member. I acknowledge that my agreement cannot be withdrawn or varied and authorise Principality to make over to CAF (or to any charities nominated by it) any such Conversion Benefits without further notice to me. 'Conversion Benefits' means any benefits under the terms of any future transfer of the Principality's business to a company except the statutory right to have shares in Principality converted into deposits with the company and, if Principality merges with any other building society, 'Society' or 'Principality' shall, after the date of such merger, extend to such other Society.

Please see the Savings Terms and Conditions for further details about this assignment.

Signature

Date

## 6. What to do now?



Make your cheque payable to 'Principality re: [insert your name here]' and take it with this form to a Principality branch or post it to:  
FAO: Savings Team  
Principality Building Society  
Principality Buildings  
PO Box 89  
Queen Street  
Cardiff  
CF10 1UA



If sending a cheque in the post please attach it to the bottom of this page. We will send your Account documents if we are able to accept your application. Alternatively we will write to you if we are unable to accept your application.

## 7. Future marketing to you

From time to time we may provide you with information regarding existing or new similar products and services offered by us (including but not limited to mortgage lending, savings, general insurance and financial services) our associated companies or our insurance and financial services partners. If you would like to receive this information, you can choose how by ticking the boxes below:

Email  Mail  Telephone  SMS

### Member Rewards

When appropriate, we'd also like to contact you with information and special offers about how to sign up for our exclusive loyalty programme, Member Rewards. This may include information on third party promotions and discounts.

If you're also happy for us to contact you about Member Rewards, please tick here:

You will only receive this information by your preferred contact method(s) detailed above, providing you have ticked at least one of them. If you don't tick one of them, you will not receive this information.

You can opt out of receiving direct marketing by calling us on 0330 333 4435 or by using the 'unsubscribe' link in our emails.

### Welsh

Where offered I would like to receive all future correspondence in Welsh:  Yes

## 8. Consent to process your personal data

Account number

By law we require your consent to process your personal data in order to operate your account. This consent will also allow us to process your personal data in connection with any savings account to which you transfer your funds internally. Without this consent, we are unable to proceed.

I agree to Principality processing my personal data for this purpose. I understand that I can contact Principality to withdraw that consent at any time but that could result in the closure of my account.

In order for your application to be processed, sign and date below:

Signature

Date

**IMPORTANT:** It can take up to 15 business days to process your transfer from the date we receive your form. For Stocks and Shares ISA transfers it can take 26 business days. If your transfer is not completed within 15 business days, please **contact us**.



**CALL US**  
0330 333 4000\*



**ONLINE**  
[principality.co.uk](https://www.principality.co.uk)



**BRANCH**  
Pop in to see us



Where home matters  
[principality.co.uk](https://www.principality.co.uk)

\*To help us maintain our service and security standards, telephone calls may be monitored and recorded.

Principality Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, reference number 155998. Principality Building Society, Principality House, The Friary, Cardiff, CF10 3FA. [principality.co.uk](https://www.principality.co.uk)