

Savings account

Application form

PRINCIPALITY
BUILDING SOCIETY

Start here ↓

Do you have a savings account or mortgage with us?

No Yes account number

1 About your proposed investment

Savings account name and Issue number

for example 30 Day Notice account - Issue 23

Amount to open the account £



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

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

2 About you – the first or only applicant

Title Mr Mrs Miss Ms Other

Surname

All other names in full

Date of birth

D D M M Y Y Y Y

Nationality

Occupation

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 numbers:

home (include area code)

work (include area code)

mobile

email address

If three or more people are applying, please use a separate application form to tell us about the other people.

3 Operating a joint account (if applicable)

Any one of us (with the exception of trustees) may sign to operate the account including withdrawals

All of us must sign to operate the account including withdrawals

Office use only

Account number

Date Opened

D D M M Y Y Y Y

Questions?

0845 045 0006

(Mon-Fri 8am-8pm, Wed 9.30am-8pm, Sat 9am-1pm)



www.principality.co.uk/help

4 About the second applicant (if applicable)

Title Mr Mrs Miss Ms Other

Surname

All other names in full

Date of birth

D D M M Y Y Y Y

Nationality

Occupation

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 numbers:

home (include area code)

work (include area code)

mobile

email address

5 How would you like interest to be paid?

Before completing this section please refer to your chosen product leaflet Terms and Conditions.

Is the interest on the account you are opening paid

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

1 Added to your savings account 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)

Continue over the page →

6 Where did you hear about this account?

- Branch advertising Principality website
 Mailing Online advertising
 Press
 Other

Please quote promotional code, if you have one

Future marketing to you

When we write to you to tell you about your account reaching Maturity (if applicable), in order to help you decide what to do with your funds, we may inform you about appropriate savings accounts we have available.

In addition we may also provide you with information regarding existing or new similar products and services offered by the Principality, (including but not limited to mortgage lending, savings, general insurance and financial services) and provided either by us, our associated companies or our carefully selected insurance and financial services partners.

Please tick if you do not want to receive this additional information by

- Mail Email Telephone SMS

To change your marketing preferences please contact us.

Where offered I would like to receive future correspondence in Welsh

- Yes

7 Declaration and signatures

Before you sign this application please make sure you've understood the terms and conditions of this account 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 8. Please check that you've answered all the questions that apply to you.

I/We confirm that I/We have received and read the following:

- Account Brochure
- Current 'Savings Terms and Conditions' booklet
- Your Savings Guide and other applicable account brochures
- The leaflet on 'Use of your Information' and 'Proving Your Identity' about the Data Protection Act and how Principality may use my personal information

I/We declare that:

- This application form has been completed to the best of my/our knowledge and belief.
- I/we accept the rules of the Principality Building Society.
- The sum being invested in the Principality by me/us will be as a sole beneficial owner if the account is in one name or as joint beneficial owners if the account is in more than one name.

We understand that (joint account holders):

- If a joint account holder dies all money in the joint account will pass automatically into the ownership of the surviving joint account holder(s).
- The first named applicant will be treated as the Representative Joint Shareholder. Only the Representative Joint Shareholder will have voting rights.
- If we are opening an account in three or more names we have used an additional application form to tell the Principality about the other people. We have clearly marked the additional application form to this effect.

If you are already a shareholding Member of Principality at the time of signing the form, the following wording in the paragraphs below already apply to you, please go to the signature line.

In all other cases:

By applying to open the share Account after 5th June 2000, 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 which I might become entitled. 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' shall, after the date of such merger, extend to such other Society.


First or only signature

Date


Second signature (if applicable)

Date

8 What to do now?

 Make your cheque payable to 'Principality re: [and insert your name(s) here]' and take it with this form to a Principality branch or post it to:

Principality Building Society, PO Box 89, Principality Buildings,
Queen Street, Cardiff CF10 1UA

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

Office use only

Checklist (All documents 1-7 must be given to customer and 8-10 explained to customer then boxes ticked **before** point of sale to confirm this)

- Product leaflet
- Savings Terms and Conditions
- Savings Rates Guide
- Leaflet on 'Uses of Your Information and Proving Your Identity'
- Leaflet on how we calculate interest rates if requested by the customer
- Fees and charges leaflet
- Summary Financial Statement to new investors
- Cooling off rights
- Confidentiality of information, and exceptions
- Notification of changes in interest rates and Terms and Conditions

Account type

Opening amount

Date opened

Branch

Cashier's name

Checked by