

Cash ISA for tax year 2019/20

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'll find this on payslips or letters from HM Revenue & Customs or the Department for Work and Pensions

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 numbers:

home (include area code)

work (include area code)

mobile

email address

Questions?

0330 333 4000*
(Mon-Fri 8am-8pm, Sat 9am-1pm)

 www.principality.co.uk

 www.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 2019/20 tax year is £20,000. You can choose to invest the whole allowance in cash, or in stocks and shares, or any combination of the two.

Continue over the page →

Office use only

Account number

Date Opened

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 and 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
- General Terms as set out in our 'Savings terms and conditions' leaflet
- 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 16 years of age or over
- I have not subscribed/made a payment to and will not subscribe/make a payment more than the overall subscription limit in total to any combination of permitted ISA types in the same tax year.
- I have not subscribed and will not subscribe to another Cash ISA in the same tax year that I subscribe to this Cash ISA
- 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 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 2019/20 and each subsequent year until further notice; and I agree to the ISA Account Terms and General Terms.

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 General Terms 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: Principality Building Society, Principality Buildings, 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

Office use only

Checklist (All documents 1-9 must be given to customer and 10 explained to customer then boxes ticked **before** point of sale to confirm this)

- 1 Your Cash ISA Rate Guide
- 2 Cash ISA Account Terms
- 3 Savings Terms and Conditions
- 4 Savings Rates Guide
- 5 'Your Information' leaflet
- 6 Leaflet on how we calculate interest rates if requested by customer
- 7 Fees and charges leaflet
- 8 Summary Financial Statement to new investors
- 9 Basic information about the protection of your eligible deposits
- 10 Confidentiality of information, and exceptions

Account type

Opening amount

Date opened

Branch

Cashier's name

* 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 Buildings, Queen Street, Cardiff, CF10 1UA. principality.co.uk

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