

CHANGE OF ADDRESS / CONTACT DETAILS

PLEASE FULLY COMPLETE IN BLOCK CAPITALS.



ACCOUNT NUMBER:

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NAME:
EMAIL ADDRESS:
HOME PHONE:
WORK PHONE:
MOBILE PHONE:
EMAIL ADDRESS:

PREVIOUS ADDRESS:

POSTCODE:

NEW ADDRESS:

POSTCODE:

CORRESPONDENCE ADDRESS, IF DIFFERENT TO ABOVE:

POSTCODE:

FIRST NAMED ACCOUNT HOLDER

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SECOND NAMED ACCOUNT HOLDER

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TAX RESIDENCY

1. ARE YOU A CITIZEN AND TAX RESIDENT OF THE UK ONLY?

☐ YES (please go to Declaration on the next page)
☐ NO (please answer questions 2-7)

2. ARE YOU A CITIZEN OF AND / OR TAX RESIDENT IN THE US?

☐ YES ☐ NO

3. If you have answered YES to Q2, please provide your US Tax Identification Number:

COUNTRY OF TAX RESIDENCY:

TAX IDENTIFICATION NUMBER (TIN):

PLEASE STATE WHY TIN NOT PROVIDED:

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|---------------|
| UNITED STATES |
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4. ARE YOU TAX RESIDENT IN A COUNTRY OTHER THAN THE UK OR US?:

☐ YES ☐ NO

PLEASE REFER TO THE NOTES AT THE END OF THIS FORM BEFORE COMPLETING THIS SECTION

☐ YES (please go to Declaration on the next page)
☐ NO (please answer questions 2-7)

☐ YES ☐ NO

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|---------------|
| UNITED STATES |
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☐ YES ☐ NO

FIRST NAMED ACCOUNT HOLDER

SECOND NAMED ACCOUNT HOLDER

5. If you have answered YES to Q4, please list the countries other than the UK and US of which you are tax resident, if any, together with associated Tax Identification Number or functional equivalent:

COUNTRY OF TAX RESIDENCY:

TAX IDENTIFICATION NUMBER (TIN):

PLEASE STATE WHY TIN NOT PROVIDED:

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6. WHAT IS YOUR OCCUPATION?:

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7. ARE YOU, YOUR SPOUSE OR CIVIL PARTNER IN THE ARMED FORCES OR A CROWN EMPLOYEE SERVING OVERSEAS?:

☐ YES ☐ NO

☐ YES ☐ NO

If you answered YES, we will contact you once we've received your form as we may need to close your account unless your occupation means that you are still counted as a UK resident for tax purposes (for example if you are in the armed forces or you are a Crown employee).

UNLESS YOU ADVISE US OTHERWISE, WE WILL UPDATE ALL ACCOUNTS ON YOUR CUSTOMER RECORD ONCE THIS FORM IS SIGNED AND RETURNED BY YOU.

TAX RESIDENCY

The UK Government has signed, and will be signing, a number of intergovernmental agreements to share tax information, where applicable, with the tax authorities in other countries. The requirement to collect certain information about each customer's tax arrangement is part of UK legislation and as a financial institution we are legally obliged to collect it. We are asking for your tax residency and tax ID numbers (where applicable) and will record this on our records now, but will only disclose this information to the relevant tax authorities if and when we are required to under UK law.

You can find out more, including a list of countries that have signed agreements to automatically exchange information, along with details about the information being requested, on the OECD automatic exchange of information portal at www.oecd.org

Your tax residence generally is the country in which you live for more than half the year, but rules differ. Further details are available at www.oecd.org

A Taxpayer Identification Number ("TIN") is a unique combination of letters or numbers assigned by a jurisdiction to an individual or an entity and used to identify the individual or entity for the purposes of administering the tax laws of such jurisdiction. Some jurisdictions do not issue a TIN. However, these jurisdictions often utilise some other high integrity number with an equivalent level of identification (a "functional equivalent"). Examples of that type of number include, for individuals, a social security / insurance number, citizen / personal identification / service code / number, and resident registration number.

As a financial institution National Counties Building Society is not allowed to give tax advice. If you have any questions on how to complete the Tax Residency section of this form we recommend that you speak to your tax authority (for example, HMRC in the UK) or your tax or legal adviser.

DECLARATIONS

I acknowledge that the information supplied on this form and information regarding myself and any reportable account may be provided to the tax authorities of the country in which the account is maintained and exchanged with tax authorities of another country or countries in which I may be tax resident pursuant to inter-governmental agreements to exchange financial account information.

I undertake to advise the Society within 30 days of any change in circumstances which affects my tax residency status or causes the information contained in this form to become incorrect, and to provide the Society with a suitably updated self-certification and declaration within 30 days of such change in circumstances.

Please print this form and sign here.

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|-----------------------------|---------|--|-------|----|----|------|
| FIRST NAMED ACCOUNT HOLDER | SIGNED: | | DATE: | DD | MM | YYYY |
| SECOND NAMED ACCOUNT HOLDER | SIGNED: | | DATE: | DD | MM | YYYY |

PLEASE RETURN THIS APPLICATION FORM TO:

Freepost FAMILY BUILDING SOCIETY. ALTERNATIVELY YOU CAN UPLOAD YOUR APPLICATION FORM SECURELY TO

familybuildingsociety.co.uk/file-upload

Family Building Society is a trading name of National Counties Building Society.