

CASH INDIVIDUAL SAVINGS ACCOUNT (ISA) RENEWAL FORM

THE
FAMILY
BUILDING
SOCIETY

Use this form to add money into an existing Family Building Society Cash Individual Savings Account (ISA) – if you have not deposited in the current / previous tax year.

Please ensure that the existing ISA you wish to pay into is still accepting funds.

If unsure, you can call us on **03330 140144** with your existing account number to hand.

YOUR DETAILS

PLEASE COMPLETE FULLY IN BLOCK CAPITALS

TITLE:	MR / MRS / MISS / MS	SURNAME:			
FORENAMES:					
PERMANENT HOME ADDRESS:					
POSTCODE:					
PHONE – HOME:*			PHONE – MOBILE:*		
EMAIL ADDRESS:*					
DATE OF BIRTH:	DD	MM	YYYY	TAX IDENTIFICATION NUMBER:	

* If we have a home or mobile phone number or email address for you, we may use these to get in touch regarding your application or with important information about your account. This could include letting you know about any concerns we have about the activity on your account.

(only applicable to foreign nationals working in the UK)

YOUR EXISTING CASH ISA WITH US

Please provide the existing Cash ISA account number you wish to make a subscription to:

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DO YOU HAVE A CASH ISA WITH ANOTHER ISA PROVIDER FOR THE CURRENT TAX YEAR?

☐ YES ☐ NO

If YES, you will not be able to credit your ISA with the Family Building Society.

YOUR INVESTMENT

THIS SUBSCRIPTION RELATES TO THE TAX YEAR OF:

	/	
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CURRENT TAX YEAR INVESTMENTS

I ENCLOSE THE SUM OF:

Cheques should be made payable to “Family Building Society” followed by your name.

£

AND / OR I WILL TRANSFER THE SUM OF:

For our bank details, please see our website:
familybuildingsociety.co.uk/our-bank-details

£

FROM AN EXISTING FAMILY BUILDING SOCIETY ACCOUNT

I APPLY TO TRANSFER:

(Delete as appropriate)

ALL	PART
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OF MY FUNDS IN THE SUM OF:

(If exact balance not known, please give an estimate)

£

FROM ACCOUNT NUMBER:

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☐ I would like to pay in at a later date by debit card, by transfer from my bank account, by cheque, by transfer from another account with you or by cash.

HOW DID YOU FIND OUT ABOUT THIS ACCOUNT?

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USING YOUR PERSONAL INFORMATION

1. Personal information which you supply to us may be used in a number of ways, for example:
 - to open and manage the account for which you are applying
 - for fraud prevention
 - for management and audit of our business
 - for market research and statistical analysis
2. Information about you will be kept after your account is closed.
3. We may share your information with, and obtain information about you from, credit reference agencies to check your identity. This will not affect your credit score.
4. We may share your personal information with other people or organisations, for example:
 - third parties for processing on our behalf
 - governmental and regulatory bodies (such as HMRC and the Financial Conduct Authority)
 - for fraud prevention and detection purposes
 - other payment services providers
 - if required to do so by law
 - with your consent
5. We may use your information to tell you about other products and services we think may be of interest to you.
6. We may monitor or record any communications you have with us in the interests of staff training, customer service and security.
7. For further details about how your personal information is used, and your rights under data protection law, please refer to the leaflet, “How We Use Personal Information”.

PLEASE COMPLETE
OVERLEAF, SIGNING AND
DATING THE CONSENT AND
CONFIRMATION SECTION.

DECLARATIONS

1. GENERAL

I hereby declare that:

- 1.1 The sum being invested does not belong to a company or other corporate body and will not be held by me as trustee(s) for a company or corporate body.
- 1.2 I agree to notify the Society of any changes to my personal details as set out overleaf.
- 1.3 The information supplied on this form is true and correct to the best of my knowledge and belief.
- 1.4 I have not subscribed and will not subscribe more than the overall subscription limit in total to a Cash ISA and a Stocks & Shares ISA in the same tax year.
- 1.5 I have not subscribed and will not subscribe to another Cash ISA in the same tax year that I subscribe to this Cash ISA (please delete if you are only opening this account as a transfer of previous years' ISA subscriptions)
- 1.6 All subscriptions made and to be made belong to me.
- 1.7 I am 16 years of age or over.
- 1.8 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 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 a civil partnership with, a person who performs such duties. I will inform the Family Building Society 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.
- 1.9 I authorise the Family Building Society:
 - 1.9.1 To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those savings and any other cash.
 - 1.9.2 To make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.

INFORMATION ABOUT ELECTRONIC PAYMENTS TO AND FROM YOUR ACCOUNT

Each month we will send you a statement listing the electronic payments on your account, unless there are no payments in that month. This excludes crediting or payment of interest. Alternatively, we can give you this information on request or via our Online Service. If you do not wish to receive such monthly statements, please tick the box ☐

MARKETING

We would like to tell you about our products, services, and events and those of our carefully selected partners (a list of which is available on request). We will always treat your personal details with the utmost care and will never share them with other companies for marketing purposes. If you give consent this will last as long as you have a relationship with us. If you agree to us communicating with you for marketing purposes, please tick the relevant boxes below to confirm how we may contact you.

Post ☐ Email ☐ Phone ☐ Text ☐

You can unsubscribe from marketing at any time by writing to: Family Building Society, Ebbisham House, 30 Church Street, Epsom, Surrey KT17 4NL.

By signing this renewal form you are:

- making the declarations and giving the authorities set out in the section "DECLARATIONS" above.
- agreeing to the use of your personal information to enable us to provide you with payment services, such as faster payments, to and from your accounts.

ACCOUNT HOLDER	SIGNED:		DATE:	DD	MM	YYYY
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PLEASE RETURN THIS RENEWAL FORM TO:
FREEPOST, FAMILY BUILDING SOCIETY. ALTERNATIVELY YOU CAN UPLOAD YOUR RENEWAL FORM SECURELY TO
FAMILYBUILDINGSOCIETY.CO.UK/FILE-UPLOAD
Family Building Society is a trading name of National Counties Building Society.

THIS SECTION IS FOR SOCIETY USE

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
IDA	<input type="text"/>						
IDP	<input type="text"/>						
PAYEE	<input type="text"/>						
DRAWER	<input type="text"/>						
SORT CODE	<input type="text"/>						
A/C No.	<input type="text"/>						
KYC	<input type="text"/>						