

Foundations Cash ISA application form



Ecology
Building Society

Return to: Ecology Building Society, 7 Belton Road, Silsden, Keighley BD20 0EE

For office use

Account number - -

Customer number ID

Initials

Date

1. your details

Full name (including title)

Permanent residential address

Postcode

Date of birth

/ /

Daytime telephone number

Do you have a National Insurance (NI) number?

Yes

No

If 'Yes' you must enter it here

Existing Ecology Account number (if any)

- -

Email address

Where did you hear about the Ecology?

You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP, or pension order book

2. your investment

How much do you want to invest monthly (minimum £25)?

£

The above amount will be debited each month for the 2009/2010 tax year, and each subsequent year until further notice, (this does not mean that you are obliged to subscribe to your ISA in each subsequent year). Please remember to complete the direct debit instruction enclosed.

And/or lump sum: I wish to invest a lump sum by cheque in the 2009/2010 tax year (minimum £25, maximum £3,600), and each subsequent year until further notice, (this does not mean that you are obliged to subscribe to your ISA in each subsequent year).

I enclose my cheque for:

£

made payable to **Ecology Building Society re: (your name)**.

3. use of information

We would like to tell you about our financial products, services and promotions, such as; mortgages, insurances and new investment products, or about other organisations we have business relationships with, which may be of interest to you. We would like to be able to contact you by post or email using the contact details which you have provided us with. By signing this form you are agreeing to the use of your information in this way. You can choose whether or not to be contacted for marketing purposes, so if you do not wish this, please indicate your preference by ticking the relevant boxes.

If you decide not to tick the box now, but later decide that you wish us to stop this use, you can ask us at any time to do this by writing to us at: 7 Belton Road, Silsden, Keighley, West Yorkshire BD20 0EE.

I **do not** wish to receive marketing information by the following methods: Post

Email

I **do not** wish my information to be used in the following ways:

By the Society to market its products or services

By the Society to send information about other related organisations

The information which you provide or which we obtain through our dealings with you or in connection with your account will be held on the Society's computers and in other records. We may use your personal information to help us provide the services you are applying for and to conduct an electronic search on you via the services of external agencies in order to confirm your identity and comply with money laundering regulations.

We may also share your information with third parties to protect both ourselves and our customers against theft or fraud and pass your information to anyone you appoint to administer/operate your account on your behalf.

Under the Data Protection Act 1998, you have the right to see and receive a copy of information held about you on our records (on payment of a fee) and to ask for any inaccurate details to be amended. For the purposes of the Data Protection Act 1998, the Data Controller in relation to any personal data you supply is Ecology Building Society. If you have any questions about the Data Protection Act or your rights under it please write to The Secretary, Ecology Building Society, 7 Belton Road, Silsden, Keighley, West Yorkshire BD20 0EE.

4. declaration and authorisation

Please sign in the space provided below

1. I am 16 years of age or over.
2. I have read the section entitled '*use of information*' and by signing this form I consent to the uses and disclosures of information listed, unless specified otherwise in that section.
3. All subscriptions made, and to be made, belong to me.
4. I have not subscribed and will not subscribe to another cash ISA in the same year that I subscribe to this cash ISA.
5. I have not subscribed and will not subscribe more than the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year.
6. I have not subscribed and will not subscribe more than the cash ISA subscription limit to one cash ISA.
7. I am resident and ordinarily 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 Ecology Building Society if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
8. I authorise Ecology Building Society:
 - to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash
 - to make on my behalf any other claims to relief from tax in respect of ISA investments
9. I have read the account terms and conditions of the account and agree to be bound by them and the Rules of the Society for the time being in force (copies of which are available on request).
10. I declare that to the best of my knowledge and belief the information I have given on this form is true.

Signed

Date