

Easy Access account application form

For office use

Account number - -

Customer number

ID

Initials

Date

Before completing, please read: *Product information leaflet, Saving with Ecology: General terms and conditions, and FSCS Information Sheet*

1. your details

APPLICANT ONE

APPLICANT TWO

Title

First name

Middle name(s)

Surname

Permanent residential address

Postcode

Email address

Help us to reduce our environmental impact. Whenever it is possible for us to do so, we will send communications to you electronically. If you would prefer to receive communications by post, please leave the above 'Email address' field blank.

Date of birth

Occupation

Nationality

Daytime telephone number

Combination of signatures required to operate account

☐

EITHER

☐

BOTH

NB: Both signatures required if account opened by trustees

If investing as trustee, name of child or other beneficiary

Date of birth of beneficiary

APPLICANT ONE

APPLICANT TWO

Are you a resident for tax purposes anywhere other than in the UK?

Yes ☐

No ☐

Are you a resident for tax purposes anywhere other than in the UK?

Yes ☐

No ☐

Are you a US Person*?

Yes ☐

No ☐

Are you a US Person*?

Yes ☐

No ☐

If you have answered "Yes" and confirmed that you are a resident for tax purposes anywhere other than the UK, or you are a US Person, you will not be able to open an account with Ecology Building Society. Therefore please do not proceed with this application.

I/we undertake to notify the Society of any changes in the circumstances listed above.

*A US Person includes US citizens (even if residing outside the US) or resident individuals.

2. your preferences

We would like to keep you informed about Ecology's accounts and services, and about like-minded organisations. If you would like to opt in please tick below:

APPLICANT ONE

APPLICANT TWO

I would like to receive marketing communications from Ecology, including information about its products and services.

☐
☐

I would like Ecology to send me marketing communications about like-minded organisations.

☐
☐

If you later change your mind about the information you want to receive from us or how you want to receive it, you can request this by contacting us via email at savings@ecology.co.uk or post.

continues overleaf

3. your initial investment and interest payment instructions

■ Investment amount: £

■ Initial investment paid by: ☐ bank transfer from a **current account** in my own name (complete details below)
☐ cheque made payable to 'Ecology Building Society re (my name)'

Initial investment payment account:

Sort code:

Account holder name:

Account number:

■ Interest to be paid/credited to:

☐ this new account ☐ the above bank account ☐ Ecology account number - -

How will the account be funded now and in the future? (e.g. inheritance/house sale/gift/pension funds/savings/disposable income)

What are your savings to be used for (e.g. house purchase/holiday/car/general long term savings) and how often do you expect to pay in and withdraw funds?

4. other details

Please be aware of the identification requirements as outlined in the leaflet *Savings account identification requirements*

■ If you already have an account with Ecology, please quote your account number here - -

■ Do you require a Direct Debit form for regular saving? ☐

■ How did you hear about us? **Advertising** ☐ **Word of mouth** ☐ **Online search** ☐ **News/magazine article** ☐

Social media ☐ **Event** ☐ **Third party referral** ☐ **Other** ☐ Please give further details:

5. use of your information

Ecology Building Society is the Data Controller of any personal data you supply.

The information you provide, we obtain through our dealings with you or about your account will be held on the Society's computers and in other records. We may use and share 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.

Under relevant data protection laws, you have a number of rights including the right to see and receive a copy of information held about you on our records and to ask for any inaccurate details to be corrected. For more details of how we will use

and share your personal information, and about your rights, please read our Privacy Notice: ecology.co.uk/homepage/privacy-notice

If you have any questions about the relevant data protection laws or your rights under them, please write to the Data Protection Officer, Ecology Building Society, 7 Belton Road, Silsden, Keighley, West Yorkshire BD20 0EE or email DPO@ecology.co.uk.

6. declaration

Each applicant should read the following before signing.

1. I/We have read the section entitled 'use of your information' and understand the uses and disclosures of the information collected.
2. I/We declare that to the best of my/our knowledge and belief the information I/we have given on this form is true.
3. I/We declare that the sum of

£

is being invested in Ecology Building Society by me/us as sole/joint beneficial owner(s).

4. I/We have read the account terms and conditions 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).
5. I/We declare that these funds are not held by me/us as Trustee(s), in any form, for Bodies Corporate.
6. Joint accounts - we understand that in the event of death of one of us, the account will be vested in the survivor.

7. Where the account is subject to a trust deed I/we understand that it is my/our responsibility as trustee(s) to ensure that, at all times, the account is operated in accordance with the trust deed and that any withdrawal requests, interest mandates or amendments to account details comply with the terms specified in that document.
8. I/We have received/downloaded and read the FSCS Information Sheet from the Society.
9. I/We confirm that I/we have read the *Easy Access account* leaflet and believe that this account is suitable for me/us.

7. signatures (of all applicants) Please sign to accept the declaration and apply.

Applicant one

Date

Applicant two

Date

Trust accounts only - please note: Where a trust account is subject to a formal trust document, accounts will only be accepted where a trustee or beneficiary has been a member of the Society for the previous twelve months.

Return to: Ecology Building Society, 7 Belton Road, Silsden, Keighley BD20 0EE. Please note: scanned copies are not accepted.