

Regular Savings 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	<input type="text"/>	<input type="text"/>
First name	<input type="text"/>	<input type="text"/>
Middle name(s)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Permanent residential address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	Postcode <input type="text"/>	Postcode <input type="text"/>
Email address	<input type="text"/>	<input type="text"/>
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	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>	<input type="text"/>
Daytime telephone number	<input type="text"/>	<input type="text"/>
Combination of signatures required to operate account	<input type="checkbox"/> EITHER <input type="checkbox"/> BOTH NB: Both signatures required if account opened by trustees	
If investing as trustee, name of child or other beneficiary	<input type="text"/>	Date of birth of beneficiary <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	APPLICANT ONE	APPLICANT TWO
Are you a resident for tax purposes anywhere other than in the UK?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Are you a resident for tax purposes anywhere other than in the UK? Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you a US Person*?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Are you a US Person*? Yes <input type="checkbox"/> No <input type="checkbox"/>
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.	<input type="checkbox"/>	<input type="checkbox"/>
I would like Ecology to send me marketing communications about like-minded organisations.	<input type="checkbox"/>	<input type="checkbox"/>

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.

3. Your monthly investment and interest payment instructions

Amount of monthly payment (minimum £25, maximum £250)

If you are paying by Direct Debit, please ensure you submit a completed Direct Debit mandate with this application form

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

If bank transfer, initial investment payment account:

Sort code: Account holder name:

Account number: Interest to be paid/credited to: This new Ecology account The above bank account
 Existing 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 initial deposit and all subsequent deposits are 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 understand that should more than two subscriptions be missed in a calendar year, or more than two withdrawals made in a calendar year, the account will be closed and the proceeds transferred to an Easy Access account.
6. I/We declare that these funds are not held by me/us as Trustee(s), in any form, for Bodies Corporate.
7. Joint accounts - we understand that in the event of death of one of us, the account will be vested in the survivor.
8. 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.
9. I/We have received/downloaded and read the FSCS Information Sheet from the Society.
10. I/We confirm that I/we have read the *Regular Savings 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.

Instruction to your bank or building society to pay by Direct Debit



Please fill in the form
and send it to:
Ecology Building Society
7 Belton Road, Silsden
Keighley BD20 0EE

To: The Manager

Name and full postal address of your bank and building society branch

Postcode

Name(s) of account holder(s)

Branch sort code

 - -

Account number

Service User Number

 8 7 4 5 6 8

Ecology Building Society reference number (For office use only)

Instruction to your bank and building society

Please pay Ecology Building Society Direct Debits from the account detailed in this Instruction, subject to the safeguards assured by the Direct Debit Guarantee.

I understand that this Instruction may remain with Ecology Building Society and, if so, details will be passed electronically to my bank or building society.

Signature(s)

Date

Banks/building societies may not accept Direct Debit Instructions for some types of accounts.

Monthly savings by Direct Debit

This is not part of the Instruction to your bank or building society and must be detached by Ecology Building Society before submission to the paying bank.

Ecology account number

Name

Address

Postcode

Daytime telephone number (only to be used in case of query)

I wish to save by monthly Direct Debit into the above Ecology account the sum of £

Minimum £10 (£25 for 90-Day Notice accounts, Regular Savings accounts and ISAs)

This sum will be collected from your account on the second working day of each month until you instruct us otherwise.

Please cut off and keep the Direct Debit Guarantee

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Ecology Building Society will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Ecology Building Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.

- If an error is made in the payment of your Direct Debit by Ecology Building Society or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society. If you receive a refund you are not entitled to, you must pay it back when Ecology Building Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.