

Cash ISA application form



For office use

Account number -

Customer number

ID

Reactivation Yes No

Initials

Date

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

1. your details

Title

First name

Middle name(s)

Surname

Permanent residential address

Postcode

Date of birth

Occupation

Daytime telephone number

Do you have a National Insurance (NI) number? Yes No

If 'Yes' you must enter it here

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.

Existing Ecology account number (if applicable) -

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.

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:

2. your investment

I apply to subscribe for a cash ISA for the tax year 2022/2023 and each successive year until further notice (this does not mean you are obliged to subscribe to your ISA in each successive year).

If you wish to make a **regular monthly payment**, which must be for a minimum of £25, you can complete and return a Direct Debit mandate with your application, or you can set up a standing order with your bank. This will be credited to your cash ISA each month for the 2022/2023 tax year and each successive year until further notice.

You can also invest a **lump sum** in the 2022/2023 tax year. Lump sum investment amount: £

- Initial investment paid by: Bank transfer from a **current account** in my name (complete details below)
 Direct Debit from a current account in my name
 Cheque from a current account in my name 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?

3. 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:

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.

4. 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.

5. declaration and authorisation

Please read the following before signing in the space provided below

I declare that:

1. I am 16 years of age or over.
2. All subscriptions made, and to be made, belong to me.
3. I have not subscribed, and will not subscribe, to another cash ISA in the same tax year that I subscribe to this cash ISA.
4. I have not subscribed, and will not subscribe, more than the overall subscription limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA and a Lifetime ISA in the same tax year.
5. 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 Ecology 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.
6. I authorise Ecology Building Society:
 - to hold my cash subscriptions and any interest earned on those subscriptions
 - to make on my behalf any claims to relief from tax in respect of ISA investments
7. I have read the cash ISA terms and conditions and agree that they, and the Rules of the Society for the time being in force (copies of which are available on request) will form the basis on which the account will operate.
8. I have received/downloaded and read the FSCS Information Sheet provided by the Society.
9. This application form has been completed to the best of my knowledge and belief.

Signature

Date

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.