

# 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 2024/2025 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 set up a standing order with your bank. This will be credited to your cash ISA each month for the 2024/2025 tax year and each successive year until further notice.

You can also invest a **lump sum** in the 2024/2025 tax year. Lump sum investment amount: £

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

Transfer from my other Ecology account (complete details below)

Cheque from a current account in my name made payable to 'Ecology Building Society re (my name)'

Bank transfer details:

Sort code:

Account holder name:

Account number:

Existing Ecology account details  Ecology 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](mailto: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](https://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](mailto: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 18 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, 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.
4. 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.
5. 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
6. 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.
7. I have received/downloaded and read the FSCS Information Sheet provided by the Society.
8. This application form has been completed to the best of my knowledge and belief.

Signature

Date