

# Ecology Savings application form for beneficiary accounts

Please tick which Ecology Savings account you are applying for:

- Easy Access:** Minimum investment £25. Pay in and withdraw whenever you need to.
- Regular Savings:** Save up to £250 a month, limited to two withdrawals a year.
- 35 Day Notice:** Minimum investment £500 with 35 days' notice needed to withdraw money.
- 180 Day Notice:** Minimum investment £1,000 with 180-days' notice needed to withdraw money.

**Before completing, please read:** Product Conditions, General Savings Terms and Conditions, and FSCS Information Sheet.

## 1. beneficiary details

Beneficiary full name

Address   
  
  
 Postcode

Date of birth of beneficiary

Nationality of beneficiary

Citizenship of beneficiary

## 2. your details

|                               | TRUSTEE ONE   | TRUSTEE TWO  |
|-------------------------------|---|--|
| Title                         | Mr <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Prof <input type="checkbox"/> Rev <input type="checkbox"/> Mx <input type="checkbox"/>                       | Mr <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Prof <input type="checkbox"/> Rev <input type="checkbox"/> Mx <input type="checkbox"/>  |
| 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"/><br><input type="text"/><br><input type="text"/><br><input type="text"/> Postcode   | <input type="text"/><br><input type="text"/><br><input type="text"/><br><input type="text"/> Postcode  |
| Email address*                | <input type="text"/>  | <input type="text"/>   |
| 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"/> | <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"/> |
| Employment Status             | <input type="text"/>  | <input type="text"/>   |
| Industry                      | <input type="text"/>  | <input type="text"/>   |

## 2. your details continued

TRUSTEE ONE

TRUSTEE TWO

Job title

Income

Nationality

Telephone number

Mobile number

If you have a National Insurance number, please enter it here

Combination of signatures required to operate the account:      Either       Both

TRUSTEE ONE  
Are you a citizen and tax resident of the UK only?      Yes       No

TRUSTEE TWO  
Are you a citizen and tax resident of the UK only?      Yes       No

Are you a US Person\*?      Yes       No

Are you a US Person\*?      Yes       No

If you are a US person and have answered "no" to "Are you a citizen and tax resident of the UK only?" 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.

## 3. your initial investment and interest payment instructions

### Your initial investment

- Investment amount:

£

- Initial investment paid by:

- bank transfer from a **UK Bank or Building Society account** in my own name (complete details below)  
 transfer from my other Ecology account (complete details below)

**Your linked account:** These details will be used as your linked account, which you will use to pay into your Ecology Savings account and to receive money that you withdraw from it. Without these details you will not be able to access your money.

Sort code:       Account holder name:

Account number:

### Your interest payments

- I would like my interest paid into:  this new account       my linked account

How will the account be funded now and in the future?

Inheritance       House sale       Gift       Pension funds       Savings       Disposable income       Other

What are your savings to be used for?

House purchase       Holiday       Car       General long term savings       Other

How often do you expect to pay in and withdraw funds?

## 4. keeping you informed

TRUSTEE ONE

TRUSTEE TWO

How would you like us to keep you informed about your account?       Email       Post

Email       Post

### Marketing preferences

Our Members power the positive impact we have on people and our planet. That's why we'd like to keep you updated with our products and services. Please let us know how you'd like to receive marketing information (you can update this at any time by emailing [savings@ecology.co.uk](mailto:savings@ecology.co.uk)).

To opt out, simply leave this section blank.

- Email  
 App notifications (Push), Text (SMS)  
 Post

- Email  
 App notifications (Push), Text (SMS)  
 Post

## 5. other details

Please be aware of the identification requirements as outlined in the 'How to prove your identity' leaflet

- If you already have an account with Ecology, please quote your account number here
- How did you hear about us? Friends or family  Already an Ecology member  Online search result  Social media

News article  Comparison/review site  Magazine (e.g. Ethical Consumer)  Events  Other  Please give further details:

## 6. 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 by the Society. 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. We use your data in line with our Privacy Policy and Terms and Conditions which includes the potential consequences of third parties using your data. Please read our Privacy Notice:

[ecology.co.uk/homepage/privacy-notice](http://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, Ellis House, 7 Belton Road, Silsden, West Yorkshire BD20 0EE or email [DPO@ecology.co.uk](mailto:DPO@ecology.co.uk).

## 7. declaration

Each Trustee 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 this amount is being invested in Ecology Building Society by me/us as trustee(s) on behalf of the beneficial owner.
4. I/We have read the General Savings Terms and Conditions and relevant Product 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. Regular Savings account applications: I/We understand that only two withdrawals can be made in a calendar year.
6. I/We declare that these funds are not held by me/us as Trustee(s), in any form, for Bodies Corporate.
7. We understand that in the event of death of one of us the remaining Trustee will maintain the account or if no trustees remain the estate will appoint a new Trustee.
8. I/We have received/downloaded and read the FSCS Information Sheet from the Society. **Please tick**
9. I/We confirm that I/we have read the Product Conditions and believe that this account is suitable for me/us.

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

|             |                      |      |                      |
|-------------|----------------------|------|----------------------|
| Trustee one | <input type="text"/> | Date | <input type="text"/> |
| Trustee two | <input type="text"/> | Date | <input type="text"/> |

For office use

Sort code  Account number

Party number

Initials  Date

**Return to:** Ecology Building Society, Ellis House, 7 Belton Road, Silsden, West Yorkshire BD20 0EE.

**Please note:** scanned copies are not accepted.