

For use by private individuals only. An additional application form should be completed where there are more than two account holders of the proposed account. For use by UK RESIDENTS ONLY. Corporate Bodies, Companies resident in the UK, Trustees for Partnerships, Charities and Unincorporated Clubs/Associations should not complete this form but should ask for the appropriate form.

# Savings Account Application Form

Share account only - deposit accounts prohibited by statute

## Standard Customer Agreement

This is our standard customer agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information

- (a) I confirm that I have read the product terms and conditions relating to the account I am opening and that I have received the General Savings Terms and Conditions and agree to be bound by them and the Rules of the Society (copies of which are available on request) and any subsequent terms and conditions and Rules for the time being in force.
- (b) I confirm that I am aware that the type of account I am opening is a share account and I understand that only the first named account holder will initially be recorded in the Society's Records as the Representative Joint Shareholder for the account. Subject to the Rules of the Society, only the Representative Joint Shareholder will have voting rights.
- (c) I declare that any share(s) acquired by me under this account will not be held by me as a bare trustee (or, in Scotland as a simple trustee) for a body corporate, or for persons who include a body corporate.
- (d) I agree to be bound by the conditions relating to the Agreement to Assign as described above.
- (e) I agree that this account (including all the provisions in this form) and all dealings on it will be subject to English law. If any provision is for any reason unenforceable, this will not affect the enforceability of any other provision.
- f) I undertake to notify the Society of change in circumstances including tax residency status and citizenship
- g) I declare that I am a permanent UK resident.
- h) I consent to the Society using electronic means to verify my identity if required.

## Marketing Choices

The Society, or members of the Society's group of companies, requires your permission to contact you for the purposes of marketing its products and services which we think may be of interest. A list of these companies is available on request. We also require your permission to pass on details to third parties who may contact you about marketing services or products to you.

If you would like us to keep you up to date with our products, services and promotions, please let us know by ticking one of the boxes below. You'll need to give us individual permission for each type of communication. If you want to change your permissions please let us know.

I consent to Furness Building Society contacting me for marketing purposes in the following ways:

- By post Applicant 1  Applicant 2
- By email Applicant 1  Applicant 2
- By SMS (text message) Applicant 1  Applicant 2
- By phone Applicant 1  Applicant 2

I consent to Furness Building Society:

sharing my information (in this form and about my account/s) for marketing purposes with other companies within the Furness Building Society group. Applicant 1  Applicant 2

sharing my information (in this form and about my account/s) for marketing purposes with other companies which the Society has a business relationship with. Applicant 1  Applicant 2

## Privacy and Your Personal Information

I confirm that I have received a copy of 'Key Facts about your personal information and what we do with it' which tells me how Furness Building Society processes my information and what my rights are.

Applicant 1  Applicant 2

Further information about how your privacy and personal data is processed is available on request or by visiting [www.furnessbs.co.uk/privacy-page](http://www.furnessbs.co.uk/privacy-page)

## Financial Services Compensation Scheme

I confirm that I have received a copy of the Financial Services Compensation Scheme Information Sheet

Applicant 1  Applicant 2

## Please make sure you have read and understood all of the declarations above before signing below:

Applicant 1: \_\_\_\_\_ Date: \_\_\_\_\_

Applicant 2: \_\_\_\_\_ Date: \_\_\_\_\_

**IMPORTANT:** All fields are mandatory and incomplete application forms may be returned and result in accounts not being opened. Before completing this form please ensure you have received the General Savings Terms and Conditions. The Rules of the Society are available on request. They provide important information about your account with the Society. Please complete this form and the read and sign the agreement to assign and the declarations overleaf. If you require any assistance in completing this form, please contact Furness Direct on 0800 834 312 or your local branch.

## ACCOUNT INFORMATION

Type of account (to be completed in all cases)

\_\_\_\_\_

Opening Amount: Cash £ \_\_\_\_\_ Cheques\* £ \_\_\_\_\_ Total £ \_\_\_\_\_

\*Cheques should be made payable to the account holder only

I authorise you to transfer £ \_\_\_\_\_ from my/our

Furness Account Number:

I authorise you to amend my/our Furness account number:           to the joint names of: (existing and new customers to complete and sign this form on the reverse)



Talk to us  
**0800 834 312**  
[www.furnessbs.co.uk](http://www.furnessbs.co.uk)

## FOR OFFICE USE ONLY

ACCOUNT NUMBER		APPLICANT 1 CUSTOMER NUMBER		APPLICANT 2 CUSTOMER NUMBER	
INTERVIEWER	INPUT BY	DATE OPENED	DATA CHECKED BY INPUTTER? YES/NO		
AUDITED BY			DATE AUDITED		

Always with your interest at heart



