



# Additional Applicant Form

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## Section 1 – Applicant Details

### Applicant 3

### Applicant 4

Title  First Name(s)

Title  First Name(s)

Surname

Date of Birth

National Insurance Number (for JISA Accounts only)

Residential Address

Postcode

Postcode

Number of years at current address

If you have lived at your current address for less than two years, please give your previous address

Postcode

Postcode

Correspondence Address (if different to Residential Address)

Postcode

Postcode

Telephone (including the STD code)

Mobile\* (UK only)

Email

\*this is required if we need to contact you for security reasons.

## Section 2 – Keeping you informed

We would like to keep you informed about our latest product and service news. This is most likely where you will hear about news on interest rates and new product launches, some of which may have limited availability so you may want to hear about them first! Our Newsletters and Customer emails contain features and articles relevant to our Customers and occasionally we will offer you competitions to enter. **We do not share your information with other firms for marketing purposes.**

We may contact you in a number of ways, as outlined below, if you do NOT wish us to contact you at all or by a particular method you can opt-out by ticking one or more of the boxes below.

**Applicant 3**

Email

Post

Telephone

**Applicant 4**

Email

Post

Telephone

## Section 3 – Privacy – Your Personal Information

We need to collect information about you in order to open and administer your savings account. The legal basis on which we process your data will be either that the processing is necessary for us to perform our contract with you or for taking steps prior to entering into it; necessary to comply with our legal obligations; in our legitimate business interests in relation to such purposes or with your consent.

The information we collect is used to verify your identity, administer your accounts, provide you with our services and to communicate with you about other products or services of ours that we think may be of interest to you.

When using your information we may also share information with anyone you appoint to administer or operate your account; regulatory and government bodies; auditors; any individuals/organisations that we use to provide services to us; and any other person or organisation if the law, public duty or our legitimate interests require us to do so.

We may send your details to credit reference agencies and/or fraud prevention agencies who will supply us with information for the purpose of verifying your identity, including information from the Electoral Register. We reserve the right to carry out further checks of your identity and address should we need to in order to comply with our legal and regulatory obligations. The credit reference agencies will record details of the search whether or not the application proceeds. The searches will not be seen or used by lenders to assess your ability to obtain credit. Credit searches and other information which is provided to us and/or the credit reference agencies or fraud prevention agencies about you and those with whom you are linked financially may be used by Bath Building Society and other companies if you, or other members of your household, apply for other facilities, including insurance applications and claims. This information may also be used for debt tracing and the prevention and detection of fraud or money laundering as well as the management of your account. Alternatively, we may ask you to provide physical forms of identification.

In making your application you acknowledge that you have received and read the summary of our Privacy Notice. Our full Privacy Notices are available from Branches, Agencies and Head Office on request, and on our website at [www.bathbuildingsociety.co.uk](http://www.bathbuildingsociety.co.uk)

#### Section 4 – Agreement to Assign Windfalls to Charity

1. I agree with the Society that, if the right to any windfall benefits are granted to me after the account is opened, I will assign those windfall benefits to the Charities Aid Foundation unless the period between account opening and conversion announcement is more than five years. I understand after five years I would receive any windfall benefits.
2. I authorise the Society and the successor to pass any windfall benefits directly to the Charities Aid Foundation without notice to me.
3. I understand that:
  - i) The Society has promised to transfer to the Charities Aid Foundation the benefit of the agreement;
  - ii) Neither the Society or the Charities Aid Foundation will release me from this agreement;
4. I authorise the Society to give the Charities Aid Foundation any information about me and the account I have with the Society (if they reasonably need it).

#### Section 5 – Declaration

I/We agree to be bound by the Rules of the Society and the terms of the account including the Terms and Conditions and the Agreement to Assign Windfalls to Charity set out in Section 4 of this application. A copy of the Rules is available on our website at [www.bathbuildingsociety.co.uk](http://www.bathbuildingsociety.co.uk) and from Head Office, our Branches and Agencies. I/We declare that the money being saved is my/our own and will not be held by me as a trustee for a body corporate, or persons who include a body corporate.

I/We confirm that I have read the relevant Key Product Information for the Account.

I/We confirm that I have read the section headed 'Privacy – Your Personal Information' and the Privacy Notice referred to which can be found on your website at [www.bathbuildingsociety.co.uk](http://www.bathbuildingsociety.co.uk).

**By signing this form, you are confirming that you are not resident or tax resident in any other country other than the UK and that you have received and read the enclosed Financial Services Compensation Scheme Information & Exclusions List.**

Signed

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Signed

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Protected

Bath Investment & Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority, Registration Number 206026.

