

# Power of Attorney & Deputies

You should read our [Power of Attorney and Deputies leaflet](#) before you complete this form. You can find this on our website or in Branch.

## Account Details for the Donor

Account holder name:	
Account number(s):	
Digital Lasting Power of Attorney (LPA) access code:	

## Appointment of Attorneys

Please tick the options as appropriate.

Appointment of Attorneys:	<input type="checkbox"/>	Sole	If there is one Attorney, the appointment is <b>Sole</b> . If there are two or more Attorneys and they must act together, they have been appointed <b>Jointly</b> . If there are two or more Attorneys and they can act independently, the appointment is <b>Jointly/Individually</b> .
	<input type="checkbox"/>	Jointly	
	<input type="checkbox"/>	Jointly/Individually	

You need to give us a certified copy of the documents relating to either the [Power of Attorney](#) or [Deputyship](#) that you are registering with us. You can give these to us to copy in our Branch, or you can post them to us at our Head Office address. You can also email us at [savings@bibs.co.uk](mailto:savings@bibs.co.uk)

You can find out more about certifying documents in our [Identification Requirements for Individuals](#) document on our website or in Branch. We will not usually return original documents by special delivery post. You should always be careful when sending any original documents in the post.

## Attorneys being added to the account

### Attorney #1

Title:		Forename(s):	
Surname:		Date of birth:	
Nationality:		Email address:	
National Insurance number:		Telephone number:	
Mobile number:		Nationality:	
Existing account numbers:			
Current address:			
If you have lived at your address for less than 2 years, please give your previous address:			
Marketing instructions:	<input type="checkbox"/>	Email	We may contact you for marketing purposes. Please tick the boxes for your preferred method of contact, or leave blank if you do not wish to be contacted.
	<input type="checkbox"/>	Post	
	<input type="checkbox"/>	Telephone	

## Attorneys being added to the account

### Attorney #2

Title:		Forename(s):	
Surname:		Date of birth:	
Nationality:		Email address:	
National Insurance number:		Telephone number:	
Mobile number:		Nationality:	
Existing account numbers:			
Current address:			
If you have lived at your address for less than 2 years, please give your previous address:			
Marketing instructions:	<input type="checkbox"/>	Email	We may contact you for marketing purposes. Please tick the boxes for your preferred method of contact, or leave blank if you do not wish to be contacted.
	<input type="checkbox"/>	Post	
	<input type="checkbox"/>	Telephone	

## Attorneys being added to the account

### Attorney #3

Title:		Forename(s):	
Surname:		Date of birth:	
Nationality:		Email address:	
National Insurance number:		Telephone number:	
Mobile number:		Nationality:	
Existing account numbers:			
Current address:			
If you have lived at your address for less than 2 years, please give your previous address:			
Email instructions:	<input type="checkbox"/>	Email	We may contact you for marketing purposes. Please tick the boxes for your preferred method of contact, or leave blank if you do not wish to be contacted.
	<input type="checkbox"/>	Post	
	<input type="checkbox"/>	Telephone	

## Declaration of **Capacity Status**

You need to tell us if the **Donor** is mentally capable of managing their own financial affairs. **Attorneys** should seek independent legal advice or contact the Office of the Public Guardian before signing this declaration.

LPA made by:	
Donor's name:	
Donor's address:	
Date LPA set up:	
Date LPA registered with Office of the Public Guardian:	
Donor capacity:	<input type="checkbox"/> The Donor is not mentally capable of managing their own affairs. <input type="checkbox"/> The Donor is mentally capable of managing their own affairs.

If you ticked to say that the **Donor** is **not** mentally capable of managing their financial affairs, please go to **Declaration A**.

If you ticked to say that the **Donor** is mentally capable of managing their financial affairs, please go to **Declaration B**.

## Declaration A

This declaration applies to each individual that signs this document.

I confirm that the Donor is not able to manage their affairs and operate their account. This is in agreement with the Lasting Power of Attorney provided to Bath Building Society.

I agree to tell Bath Building Society if the Donor becomes able to manage their financial affairs and operate their accounts at any time in the future.

I understand that Bath Building Society will no longer accept instructions from the Donor.

I understand that Bath Building Society will send a letter to the Donor to advise that I have signed this declaration. If I have any concerns about this letter to the Donor, I should inform Bath Building Society immediately to avoid harm to the Donor.

I understand that if the Donor disputes this declaration, Bath Building Society will not allow payments from the Donor's account, and that any such dispute will need to be referred to the Office of the Public Guardian.

I confirm that I have complied with my duties as Attorney under the Lasting Power of Attorney to the best of my knowledge.

Signatory name:	Signatory name:
Signature:	Signature:
Date:	Date:

## Declaration B

This declaration applies to each individual that signs this document.

I confirm that the Donor is able to manage their affairs and operate their account. This is in agreement with the Lasting Power of Attorney provided to Bath Building Society.

I understand that Bath Building Society will write to the Donor to advise that I have signed this declaration.

I agree to tell Bath Building Society if the Donor becomes unable to manage their financial affairs and operate their accounts at any time in the future.



Signatory name:		Signatory name:	
Signature:		Signature:	
Date:		Date:	

## Change of Withdrawal Options

Please tick the options as appropriate.

Previous withdrawal instructions:	<input type="checkbox"/>	Any one signatory	New withdrawal instructions:	<input type="checkbox"/>	Any one signatory
	<input type="checkbox"/>	All signatories jointly		<input type="checkbox"/>	All signatories jointly
	<input type="checkbox"/>	Any ___ signatories		<input type="checkbox"/>	Any ___ signatories

## Declaration

This declaration applies to each individual that signs this document.

I 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. A copy of the Rules is available from Head Office and our Branches. The Society's Terms and Conditions and the Agreement to Assign Windfalls to Charity are outlined in the Welcome to Your Bath Building Society Account brochure, which is available on our website and in our Branches.

I confirm that I have read the Key Product Information for the account.

I agree that the information given on this form is correct and has all the information I can provide. If I remember any information that has not been given on the form or if any information changes, I will let Bath Building Society know within 30 days.

I have read a copy of the Bath Building Society Privacy Notice. I am aware that a copy of the Privacy Notice is available on request or by visiting our website.

I understand that Bath Building Society does not share my information with other entities for marketing purposes.

I confirm that I am not resident or tax resident in any other country other than the UK and that I have received and read the Financial Services Compensation Scheme Information & Exclusions List.

I confirm that I have provided a copy of the Lasting Power of Attorney document to Bath Building Society.

Signatory name:	Signatory name:
Signature:	Signature:
Date:	Date:

---

Please return the form to our Head Office address at **Head Office, 15 Queen Square, Bath BA1 2HN**. You can also return it to one of our **Branches**, or to [savings@bibs.co.uk](mailto:savings@bibs.co.uk)

**For Office use:**

Actioned by:	Checked by:
Date received:	Received at:

---

Version: July 2023