

**Declarations and consents**

This is a share account and you will be a member of the Society and bound by its rules, a copy of which is available on request.

**I declare that:**

- (a) I have read and understood the Savings Account Terms and Conditions which contain details of the cooling off period. I have also received a copy of the Interest Rates for Savers leaflet which contains details of the interest rate on this account and any charges payable. For your own benefit and protection each account holder should carefully read the Savings Terms and Conditions booklet or view the Savings Terms and Conditions at hrbs.co.uk, as the Society intends to rely upon these terms and conditions. If you do not understand any point, please ask for further information.
- (b) the sum shown on the application form is being invested in Hinckley & Rugby Building Society by either me as sole beneficial owner, us as joint beneficial owners or me as nominee, attorney, deputy or executor for a member where all withdrawals will be undertaken as agent for the member.
- (c) that the total amount invested by me in the Society, whether individually or jointly (including the amount being invested) does not exceed £300,000 and that I will not make any additional investments in the Society that would raise the total amount above £300,000.
- (d) the investment will not be held by me as a bare trustee for a body corporate or for persons who include a body corporate.
- (e) we understand that the society reserves the right and may request additional information and supporting documentation which we are to provide promptly and accurately to help verify the source of funds and the underlying source of wealth, or other relevant details in relation to the account.

I acknowledge that my personal information provided in this application form will be used by the Society in accordance with the Society's Customer Privacy Notice, a summary of which I have been provided with, the full text of which is set out on the Society's website and hard copies of which can be provided upon request.

I acknowledge that this may include my personal data being used:

- to make identification checks and to request a credit reference from one or more of the credit referencing agencies including the use of information on the electoral register for the purpose of verifying my identity and the prevention of money laundering and fraud; and
- in order to share information about my account to the Financial Conduct Authority and the Society's Auditors for regulatory and audit purposes, and the payee bank on any automated electronic transactions.

I understand that if any information changes during the life of the account I should inform the Society.

**I confirm that I have read and understood all of the following documents:**

- an account brochure, containing information specific to the account I am opening
- the Society's Savings Terms and Conditions booklet
- Interest Rates for Savers leaflet
- Deposit Guarantee Scheme information leaflet
- Summary Customer Privacy Notice

**Are all investors on the account citizens and tax residents of the UK only?**  YES  NO

If 'No', please contact us for a self-certification form.

Please tick if you wish to be contacted to discuss any reasonable adjustments or adaptations to our service that we may be able to make in order to meet your needs. This could include a health condition you feel that we should be aware of when we communicate with you about your savings account verbally or in writing. Any information disclosed will only be held in the Society's records for as long as necessary and will only be used by relevant Hinckley & Rugby staff when dealing with your account.

**For joint accounts**

The account will be setup so that all account holders will be required to sign for withdrawals, close the account or terminate this authority unless you confirm otherwise. Please confirm your preference below:

- Any one joint investor to sign** - I agree that either or any one of us may withdraw any or all of the money from the account and give good receipt to the Society. The Society may also rely on the signature of either or any one of us for any instruction or authority connected with this account. The Society may cancel this authority if we are made aware of any dispute between the parties.
- All joint account holders to sign** to withdraw any or all money from the account or any instruction or authority connected with this account.

## Your preferences

If you would you like to receive information about other Hinckley & Rugby Building Society products and services, please tick all that apply:

### First named account holder

Post  Email  Telephone  Text message

### Second named account holder/Nominee/POA

Post  Email  Telephone  Text message

### Third named account holder/Nominee/POA

Post  Email  Telephone  Text message

### Fourth named account holder/Nominee/POA

Post  Email  Telephone  Text message

The Society will only market to you in accordance with the Society's Customer Privacy Notice. You can unsubscribe from the Society marketing to you at any time by contacting us at [dataprotectionofficer@hrbs.co.uk](mailto:dataprotectionofficer@hrbs.co.uk) or by telephone on 01455 894090.

## Electronic Communications

Society communications and notices, including AGM information and voting packs may be sent to you electronically if you have provided us with your email address or mobile telephone number for SMS text messaging.

**If you wish to opt out of electronic communications**, please tick here and we will continue to send these by letter to your registered address

07/23