

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 confirm that I have read and understood the Savings Account Terms and Conditions which contain details of the cooling off period. 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. I have read and understood the special terms and conditions relating to this account as set out in the product brochure. I have received a copy of the interest rates leaflet, which contains details of any charges payable and our other savings products.

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 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 declare that the sum shown on the application form is being invested in Hinckley & Rugby Building Society by either me as sole beneficial owner or us as joint beneficial owners.

I declare that the investment will not be held by me as a bare trustee for a body corporate or for persons who include a body corporate.

I 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. If any information changes during the life of the account I should inform the Society

I understand that you may use the money in this Offset Savings account towards payment of any money owed to the Society, which is due for payment but has not been paid on my Offset Mortgage account. This is known as right of set off.

Are all account holders citizens and tax residents of the UK only?

☐ YES ☐ NO

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

For joint accounts, instructions to transfer funds to your bank account (from which direct debits are collected to pay your mortgage) and/or your Offset Mortgage Account will be accepted from either account holder. The account will be setup so that all account holders will be required to sign for any other 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 (other than transfers to your bank or Offset Mortgage account as confirmed above) or any instruction or authority connected with this account.
- ☐ 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.
- ☐ **I confirm that I have received** 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 and a Summary Customer Privacy Notice

How we will communicate with you

To ensure you receive important updates about your account as quickly and efficiently as possible, we are moving to email as our primary method of communication. This will include all important information about your account, such as interest rates, account servicing, or legal notifications.

You'll begin receiving more communications from the Society via the email address you've registered with us. Rest assured, we will never use your email address for marketing purposes unless you've explicitly given us permission.

If you would prefer to continue receiving paper communications, please call us on **0800 434 6343**.

Marketing preferences

We'd like to send you occasional updates including Society news and details of new products or services that may benefit you. You can choose to receive marketing communications from us below:

First named account holder

☐ Post ☐ Email ☐ Mobile telephone
☐ Text message ☐ Home telephone

Second named account holder/Nominee/POA

☐ Post ☐ Email ☐ Mobile Telephone
☐ Text message ☐ Home telephone

You're in control of how we communicate with you. You can update your preferences at any time by emailing customerservice@hrbs.co.uk or calling 0800 434 6343. We'll never share your details with any third parties. Find out about how we use your information in our Privacy Policy - hrbs.co.uk/privacy-policy/

© Hinckley & Rugby Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority. The Society's registration number is 206043

10/25