

Cash Junior ISA application form



SOCIETY USE ONLY:

Account number

Product type

Opening balance £

Personal cheque

Date

Newbury Building Society requires a fully completed form before opening your account. Please use BLOCK CAPITALS. If you are opening a JISA for a child please complete sections A and B. If you are a child aged over 16 and applying for the JISA yourself please complete section B.

A) Your details

Title

Forename(s)

Surname

Current home address

Postcode

Evening tel

Mobile tel

Daytime tel

Email

Date of birth

Country and town of birth

Marital status

Nationality/Citizenship

Do you have a National Insurance number? Yes No

If yes, please detail

Countries resident for tax purposes

Do you have a Tax Identification number for another country? Yes No

If yes, country and number

Occupation

Are you currently, or have you ever been party to a Newbury Building Society account? Yes No

If you know your account number, enter it here

B) Child's details

Title

Forename(s)

Surname

Current home address

Postcode

Evening tel

Date of birth

Country and town of birth

Nationality/Citizenship

Do you have a National Insurance number? Yes No

If yes, please detail

Are you currently, or have you ever been party to a Newbury Building Society account? Yes No

If you know your account number, enter it here

The Financial Services Compensation Scheme (FSCS)

I acknowledge receipt of the FSCS Information Sheet.

Signatory

Signed

Date

Consent to receive marketing communications (only applicable to those aged 18+)

From time to time Newbury Building Society would like to send you details of our products and services that may be of interest to you. We will always treat your personal details in accordance with our privacy notice and will never share them with other companies without your explicit consent or other legal grounds for processing.

Please let us know if you would like us to contact you or not by selecting one of the options below:

- Yes please, I'd like to hear about the Society's products and services.
 No thanks, I don't want to hear about the Society's products and services.

If you've said yes, please confirm how you would prefer us to contact you (tick all that apply):

By email: By post:

If you wish to stop receiving marketing communications from us, you will be able to do so at any time by:

- emailing marketing@newbury.co.uk;
- visiting our marketing preferences page through the links available in our emails and website footer;
- calling us on 01635 555700;
- visiting any of the Society's branches;
- post to Newbury Building Society, 17 Bartholomew Street, Newbury, RG14 5LY;
- following the unsubscribe link contained in our email communications.

AGM communication preferences

If you are a qualifying member, the Society has a statutory duty to give you notice of its Annual General Meeting. Please indicate below how you would prefer to receive this notice:

By email By post

You can change your preference or contact details at any time by contacting us using any of the methods in the 'Consent to receive marketing communications' section above. If you have already advised us that you wish to receive the notice by email, we will continue to send it by this method unless you advise us otherwise.

Agreement to assign windfalls to charity

Words printed in italics in this section of the application form are explained in the notes overleaf.

1. Paragraphs 2 to 6, below, will apply to me unless I am an *exempt customer* at the time when the *account* is opened.
2. I agree with the Society that, if the right to any *windfall benefits* is granted to me after the *account* is opened, I will assign those *windfall benefits* to the *selected charity* unless the period between my *account* being opened and the *conversion announcement date* is more than 5 years (or, if applicable, the *shorter period*).
3. I authorise the Society and the *successor* to pass any *windfall benefits* direct to the *selected charity* (or to any other charity which the *selected charity* may nominate to receive those benefits), without notice to me.
4. I understand that the Society has promised to transfer to the *selected charity* the benefit of the agreement which I have given under paragraph 2, above; neither the Society nor the *selected charity* will release me from that agreement; and any power of the Society to change the terms of its contract with me will not apply to any of the terms set out in this section of the application form.
5. I authorise the Society to give the *selected charity* any information about me or any account which I have with the Society (now or in the future) - but only if the *selected charity* reasonably needs it regarding the agreement I have given under paragraph 2, above.
6. I understand that the Society will require anyone who opens a share account (who is not then an *exempt customer*) to agree to assign to charity the right to any *windfall benefits* to which that person may become entitled. The terms of the agreement will be decided by the Society and may be different from the terms in paragraphs 1 to 5, above. This paragraph will no longer apply if the Society publishes a notice in the press of a decision by the Society that it will no longer require new shareholding members to enter into such agreements.

Notes

These notes apply to paragraphs 1 to 6, above:

- a) The *'account'* is the share account which you are applying to open by completing this form.
- b) The *'conversion announcement date'* means the date on which the Society makes a public announcement of a proposal to transfer its business to a successor.
- c) The *'current terms'* means terms which are the same as, or similar to, the terms set out in paragraphs 2 to 5, above.
- d) You are an *'exempt customer'* when you open the account if:
 - you have held shares in the Society on, and at all times since, 20 February 2000; or
 - you have already entered into an agreement with the Society binding you to the current terms and have continued to hold shares in the Society at all times since the account for which you were then applying was *opened*; or
 - you belong in respect of the account to one of the groups of other people who, in the Society's opinion, do not need to be asked to agree to the *current terms*. A list of these groups is available from the Society at any time. The Society may alter the number and composition of the groups from time to time, but no alteration will apply retrospectively.
- e) A person *'opens'* an account either by opening a new account or by having an existing account transferred into his or her name (whether as sole or joint holder).
- f) The *'selected charity'* means the Charities Aid Foundation or, if it is at any time no longer a registered charity, any other charity or charities selected by it to receive assignments of *windfall benefits*.
- g) A *'shorter period'* is applicable if, when the Society opens your account, you belong to one of the groups of people who, in the Society's opinion, do not need to be asked to agree the usual 5 year period. A list of these groups, stating the periods applicable to them, is available from the Society at any time. The Society may alter the number

and composition of the groups and the periods applicable to them from time to time, but no alteration will apply retrospectively.

- h) The *'successor'* is any company or other corporate body to which the Society transfers its business under Section 97 of the Building Societies Act 1986 (or under any provision which amends or replaces it).
- i) A *'windfall benefit'* is a benefit which a person has the right to receive as a shareholding member of the Society, under the terms of any future transfer of the Society's business to a successor (i.e., on a conversion or take-over), other than:- the replacement of savings in a share account with the Society with savings in a deposit account with the successor, or any benefit which the Society has decided may be kept by a person who has a number of accounts and was an exempt customer when opening one or more (but not all) of them. A list setting out the conditions which determine whether, and to what extent, such a person may keep a benefit is available from the Society at any time. These conditions may be altered by the Society from time to time, but no alteration will apply retrospectively.
- j) Where more than one of you is signing this form, paragraph 1 and (if applicable) paragraphs 2 to 6, above, apply to each of you separately.
- k) If the Society no longer exists following a merger with another building society, paragraphs 2 to 6, above, will still apply between you and the other society.

Declaration - APPLICANT MUST SIGN

I that:

- I am 16 years of age or over;
- I am the child or I have parental responsibility for the child;
- I/the child does not have a Child Trust Fund account;
- I will be the registered contact for the JISA;
- The child is resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a civil partnership with a UK Crown servant;
- I understand that the child will be the beneficial owner of the investments in the JISA;
- I have not subscribed and will not subscribe to another JISA of this type for this child;
- I am not aware that this child has another JISA of this type;
- I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit;
- I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded;
- I have received and read the Society's Savings terms and conditions and product conditions relating to the chosen investment account;
- I agree to be bound by the Society's Rules;
- These shares will not be held by me as a bare trustee for a body corporate, or for persons who include a body corporate; and
- I have read and understood the 'Agreement to assign windfalls to charity' and the 'Declaration'.

I authorise Newbury Building Society:

- to hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash; and
- to make on the child's behalf any claims to relief from tax in respect of JISA investments.

We comply with the General Data Protection Regulation (GDPR) and any other applicable data protection legislation. Our Privacy Notice sets out the basis on which any personal data we collect from you, or that you provide to us, will be treated.

By signing this declaration, you are confirming that you have received a copy of our Privacy Notice. The notice may be updated from time to time. If we are going to use your personal data for any new purposes, we will bring any changes to the Privacy Notice to your attention.

The latest version is available via our website at www.newbury.co.uk/privacy-notice/, in any of our branches or by calling us on 01635 555700.

I agree to the JISA terms and conditions and confirm that to the best of my belief the information in this form is true.

Signed

SIGNATURE

Date

SOCIETY USE ONLY:

Registered contact

Child

1

1

2

2

Branch

Opened by

Checked by

Date