

Account amendment form

Important - please provide documentary evidence to show the change of details and fully complete the relevant section(s) in BLOCK CAPITALS. Remember to sign and date this form overleaf. ***If you do not sign the form, we cannot make the changes requested.***



Customer's name _____

Savings Account number(s)

Mortgage Account number(s)

☐ **Change of name** - Please enter the new details to be amended on the account

Title

Changed by:

Forename(s)

☐ Marriage

Surname

☐ Deedpoll

New signature

☐ Other (please specify)

Company/organisation name

☐ **Change of address/contact details**

New home address

Please complete

Country and town of birth

Nationality

Occupation

Marital status

Email

Postcode

Telephone number

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

☐ Tick here to change correspondence address (only applicable to nominee, POA or club accounts)

☐ **Change of interest payment (savings accounts only)** - I/we wish the interest to be:

☐ Added to the account

☐ Transferred to an existing Newbury Building Society account

Account no.

☐ Paid into another UK Bank or Building Society account

Account no.

Name of Bank/Building Society

Sort code

Account holder name

Reference

☐ **Change of withdrawal instruction (savings accounts only)**

☐ Either to sign ☐ All applicants to sign ☐ Any 1 to sign ☐ Any 2 to sign ☐ Nominee to sign

Keeping you informed (only applicable to those aged 18+)

Newbury Building Society would like to ensure you are the first to know about new products and changes to our existing products. We will also keep you informed about the support and investments we make in our local communities. We will always treat your personal details in accordance with our privacy notice and will never share them with other organisations without your explicit consent or other legal grounds for processing.

Let us know if you would like us to contact you by selecting the options below (select all that apply):

Applicant 1

☐ By email ☐ By post

Applicant 2

☐ By email ☐ By post

You're in control of your preferences. If you change your mind and wish to opt out from marketing communications from us, you will be able to do so at any time by emailing marketing@newbury.co.uk; visiting our website; calling us on 01635 555700; visiting any of the Society's branches; by post or by following the unsubscribe link contained in our email communications.

AGM & Rate Change communication preferences

If you are a qualifying member, the Society has a statutory duty to give notice of its Annual General Meeting and inform of any downward rate changes to all qualifying members. These notifications will be emailed to you to help us reduce costs and paper waste. If you do not have an email address the notification will be sent by post, or you can choose to receive your notifications by post by ticking the below

Applicant 1

AGM by post ☐

Rate Change by post ☐

Applicant 2

AGM by post ☐

Rate Change by post ☐

In signing below I/we confirm I/we understand that the personal information I/we have given on this form will be used to update my/our Newbury Building Society records as requested. We comply with the General Data Protection Regulation (GDPR) and any other applicable data protection legislation. Our Privacy Notice, which has previously been provided to you, sets out the basis on which any personal data we collect from you, or that you provide to us, will be treated. 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**.

Signature(s) in accordance with existing mandate

Name	<input type="text" value="PRINT NAME"/>	Signed	<input type="text" value="SIGNATURE"/>	Date	<input type="text"/>
Name	<input type="text" value="PRINT NAME"/>	Signed	<input type="text" value="SIGNATURE"/>	Date	<input type="text"/>

Signature(s) copy of next of kin/administrator/executor signature

Name	<input type="text" value="PRINT NAME"/>	Signed	<input type="text" value="SIGNATURE"/>	Date	<input type="text"/>
Name	<input type="text" value="PRINT NAME"/>	Signed	<input type="text" value="SIGNATURE"/>	Date	<input type="text"/>

FOR SOCIETY USE ONLY

- | | |
|---|---|
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Change interest payment | Y <input type="checkbox"/> N <input type="checkbox"/> Added notes to DSX/Summit (if required) |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Registration of death | Y <input type="checkbox"/> N <input type="checkbox"/> Checked ACHE for account correspondence |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Signature(s) verified | Y <input type="checkbox"/> N <input type="checkbox"/> Checked CUE for living address |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Records amended | Y <input type="checkbox"/> N <input type="checkbox"/> Checked CUAC & ACAC for country code |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Passbook(s) amended | |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Foreign address | |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Change myaccounts | |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Remove dormancy warning + EQMS actioned | |
| Y <input type="checkbox"/> N <input type="checkbox"/> CSD <input type="checkbox"/> Passbook sighted for branch change of address
(for face to face only) | |

CSD notified to change control level	Signed	Date
Document		
Branch	Amended by	Checked by
Account Number	Branch code	Date
Vulnerable customer hold code added	Yes <input type="checkbox"/>	Details

Newbury Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register number 206077). English Law applies and we will communicate with you in English. We are participants of the Financial Ombudsman Service. We have a complaints procedure which we will provide on request. Most complaints that we cannot resolve can be referred to the Financial Ombudsman Service. A439