



THE
FAMILY
BUILDING
SOCIETY

FAMILY SECURITY ACCOUNT
APPLICATION FORM

HOW DID YOU FIND OUT ABOUT THIS ACCOUNT?

OPENING INVESTMENT

TO OPEN A FAMILY SECURITY ACCOUNT (minimum £5,000)

I / WE ENCLOSE THE SUM OF:	£
AND / OR PLEASE TRANSFER THE SUM OF:	£

FROM EXISTING ACCOUNT No.

NOMINATED ACCOUNT FOR WITHDRAWALS AND INTEREST PAYMENTS

ACCOUNT NAME:	<input type="text"/>
ACCOUNT No:	<input type="text"/>
BANK NAME:	<input type="text"/>
SORT CODE:	<input type="text"/>
BRANCH:	<input type="text"/>
REFERENCE IF APPLICABLE:	<input type="text"/>

NAME(S) OF FAMILY MORTGAGE BORROWERS SUPPORTED BY THIS APPLICATION:

SOLICITORS

For your protection, prior to completion of the loan, you will be required to obtain independent legal advice from a Solicitor or Licensed Conveyancer, who, if you wish, may be a Solicitor or Licensed Conveyancer from the same firm as the firm acting in the loan completion, but not the same person as that acting on behalf of the borrowers in the loan completion. The Solicitor or Licensed Conveyancer will be required to advise on the transaction generally and the extent of your liability and the risks involved. The legal representative advising you must hold a current Practising Certificate. You will be responsible for all of their fees and disbursements.

NAME OF FIRM:	<input type="text"/>
CONTACT NAME:	<input type="text"/>
REFERENCE NO:	<input type="text"/>
DX TOWN AND NO:	<input type="text"/>
ADDRESS:	<input type="text"/>
	POSTCODE: <input type="text"/>
TELEPHONE:	FAX: <input type="text"/>

PLEASE COMPLETE OVERLEAF, SIGNING AND DATING THE CONSENT AND CONFIRMATION SECTION.

USE OF PERSONAL INFORMATION

- The Society will hold the information supplied by you on this form and obtained elsewhere on a computer or in any other way. Information supplied by you will be kept after your account is closed. You have the right to obtain a copy of the information the Society holds about you on payment of a fee and to have any inaccuracies corrected. If you have any questions about the Data Protection Act or your rights under it, please write to Family Building Society, FREEPOST, 30 Church Street, Epsom, Surrey, KT17 4BR.
- The Society will use the information held about you to open and manage the account for which you are applying, for market research, statistical analysis and general business purposes.
- The Society will use the information held about you to check your identity in order to comply with money laundering regulations. We will make searches about you online at a credit reference agency that will supply us with information, including details from the Electoral Register.
- The Society will disclose information supplied by you on this form and about your account to the Family Mortgage Borrower(s) supported by this application and other Family Offset and / or Family Security Account holders (where applicable) who are also assisting the Family Mortgage Borrower(s).
- The Society may disclose information held about you to regulatory authorities and compliance bodies (including the Financial Conduct Authority) and to third parties for processing on our behalf or for fraud prevention and detection purposes. The Society may also disclose your information if required or allowed to do so by law.
- The Society may monitor or record any communications you have with us in the interests of staff training, customer service and security.
- The Society may use your information to inform you (by post, telephone or email) of financial and other products and services offered by the Society, its subsidiaries and selected third parties which may be of interest to you. The Society may release your name and address to its subsidiaries for this purpose but will not release this information to any third parties.

THIS SECTION IS FOR SOCIETY USE

<input type="text"/>	<input type="text"/>
IDA	<input type="text"/>
IDP	<input type="text"/>
PAYEE	<input type="text"/>
DRAWER	<input type="text"/>
SORT CODE	<input type="text"/>
A/C No.	<input type="text"/>

DECLARATIONS

1 GENERAL

I (each of us if more than one is applying) hereby declare that:

- 1.1 The sum being invested does not belong to a company or other corporate body and will not be held by me as trustee(s) for a company or corporate body.
- 1.2 I have received the following:
 - Product Features leaflet
 - General Conditions for our Savings Accounts booklet
 - The leaflet on “How We Use Personal Information”
- 1.3 I agree to notify the Society of any changes to my personal details as set out overleaf.
- 1.4 The information supplied on this form is true and correct to the best of my knowledge and belief.

2 JOINT SAVERS (NOT TRUSTS OR ESTATES)

We authorise the Society to permit either of us to operate the account and to give good discharge to the Society on behalf of both of us and agree that upon death the amount vests in the survivor.

We accept that the funds invested are deemed to be owned in equal shares for the purposes of taxation.

3 AGREEMENT TO ASSIGN CONVERSION BENEFITS TO CHARITY

- 3.1 By applying to open a share account on or after 14 February 2000 I/we agree with the Society and the Charities Aid Foundation (“the CAF”) that I/we will assign to the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 11 February 2000 between the Society and the CAF, in which case references to the CAF shall include references to any other charity(ies) but to no other person), the rights to any relevant conversion benefits (defined in paragraph 3.2.1 below). This agreement to assign will not apply to me/us if I/we fall within any class of persons which, as at today’s date, the Society wishes to be excluded from such obligation. This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me/us. I/We understand that neither the Society nor the CAF will release me/us from this agreement or vary its terms and (except as set out in paragraph 3.3 below) I/We will continue to be bound by the agreement even if the Society decides at some time in the future that it is no longer in the best interests of the Society to continue with the above assignment condition generally in respect of new members.
- 3.2.1 “Relevant conversion benefits” means any benefits to which I/we might become entitled as a shareholding member of the Society under the terms of any future transfer of the Society’s business to a company (i.e. on a conversion or take-over) which is completed at any time within the five years immediately following the date on which my/our share account is opened or, if applicable, the shorter period set out in the list referred to below. “Relevant conversion benefits” does not include the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company on a conversion or take-over.
- 3.2.2 If the Society merges with any other society, after the date of such merger the “Society” includes such other society.
- 3.3 I/We authorise the Society to pass to the CAF such information relating to me/us and my/our accounts with the Society as the CAF may reasonably require in order to administer this agreement and the relevant conversion benefits and for no other purpose. I/We consent to both the Society and the CAF holding and processing such information for such purposes.

A list of the classes of persons which the Society currently wishes to be excluded from the agreement to assign, or in respect of which a shorter period applies, (which list may change from time to time but not with retrospective effect) is available on request from the Society’s branch or principal office.

CONSENT AND CONFIRMATION

By signing this application form you are:

- confirming that you have read the section “Use of Personal Information” and that you consent to the use of your personal information as explained in this form and in our leaflet “How We Use Personal Information” which accompanies this application form.
- making the declarations and giving the authorities set out in the section “DECLARATIONS” above.

For your own benefit and protection you should carefully read the Product Features leaflet and the General Conditions for our Savings Accounts booklet as these contain the terms and conditions upon which the Society intends to rely. You should do this before signing this application form. If you have any questions about the account terms and conditions please contact our Customer Centre on 03330 140141 or customer.centre@familybsoc.co.uk.

Tick here if you **do not** want to receive information about Family Building Society and any special offers by: post email text message

FIRST NAMED ACCOUNT HOLDER	SIGNED:		DATE:	DD	MM	YYYY
SECOND NAMED ACCOUNT HOLDER	SIGNED:		DATE:	DD	MM	YYYY

PLEASE RETURN THIS APPLICATION FORM TO:

FAMILY BUILDING SOCIETY, FREEPOST, 30 CHURCH STREET, EPSOM, SURREY KT17 4BR.

PLEASE RETAIN THE PRODUCT FEATURES LEAFLET AND GENERAL CONDITIONS FOR OUR SAVINGS ACCOUNTS BOOKLET FOR YOUR FUTURE REFERENCE.

FAMILY BUILDING SOCIETY IS A TRADING NAME OF NATIONAL COUNTIES BUILDING SOCIETY.