

# Ecology Savings application form for beneficiary accounts

Please tick which Ecology Savings account you are applying for:

- Easy Access:** Minimum investment £25. Pay in and withdraw whenever you need to.
- Regular Savings:** Save between £10 and £250 a month, limited to two withdrawals a year.
- 35 Day Notice:** Minimum investment £500 with 35 days' notice needed to withdraw money.

**Before completing, please read:** *Product Conditions, General Savings Terms and Conditions, and FSCS Information Sheet.*

## 1. beneficiary details

Beneficiary full name	<input type="text"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Postcode
Date of birth of beneficiary	<input type="text"/>
Nationality of beneficiary	<input type="text"/>
Citizenship of beneficiary	<input type="text"/>

## 2. your details

	TRUSTEE ONE	TRUSTEE TWO
Title	Mr <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Prof <input type="checkbox"/> Rev <input type="checkbox"/> Mx <input type="checkbox"/>	Mr <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Prof <input type="checkbox"/> Rev <input type="checkbox"/> Mx <input type="checkbox"/>
First name	<input type="text"/>	<input type="text"/>
Middle name(s)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Permanent residential address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Postcode	Postcode
Email address	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>
Employment Status	<input type="text"/>	<input type="text"/>
Industry	<input type="text"/>	<input type="text"/>

## 2. your details cont.

TRUSTEE ONE

TRUSTEE TWO

Job title

Income

Nationality

Telephone number

Mobile number

If you have a National Insurance number, please enter it here

Combination of signatures required to operate the account:

Either

Both

Are you a citizen and tax resident of the UK only?

TRUSTEE ONE

Yes  No

Are you a citizen and tax resident of the UK only?

TRUSTEE TWO

Yes  No

Are you a US Person\*?

Yes  No

Are you a US Person\*?

Yes  No

If you are a US person and have answered "no" to "Are you a citizen and tax resident of the UK only?" you will not be able to open an account with Ecology Building Society. Therefore please do not proceed with this application.

I/we undertake to notify the Society of any changes in the circumstances listed above.

\*A US Person includes US citizens (even if residing outside the US) or resident individuals.

## 2. your initial investment and interest payment instructions

### Your initial investment

Investment amount:

Initial investment paid by:

bank transfer from a **UK Bank or Building Society account** in my own name (complete details below)

transfer from my other Ecology account (complete details below)

**Your linked account:** These details will be used as your linked account, which you will use to pay into your Ecology Savings account and to receive money that you withdraw from it. Without these details you will not be able to access your money.

Sort code:

Account holder name:

Account number:

### Your interest payments

I would like my interest paid into:  this new account  my linked account

How will the account be funded now and in the future?

Inheritance  House sale  Gift  Pension funds  Savings  Disposable income  Other

What are your savings to be used for?

House purchase  Holiday  Car  General long term savings  Other

How often do you expect to pay in and withdraw funds?

## 3. keeping you informed

How would you like us to keep you informed about your account?

TRUSTEE ONE

Email  Post

TRUSTEE TWO

Email  Post

### Marketing preferences

Our Members power the positive impact we have on people and our planet. That's why we'd like to keep you updated with our products and services. Please let us know how you'd like to receive marketing information (you can update this at any time by emailing [savings@ecology.co.uk](mailto:savings@ecology.co.uk)).

To opt out, simply leave this section blank.

Email

App notifications (Push), Text (SMS)

Post

Email

App notifications (Push), Text (SMS)

Post

## 4. other details

Please be aware of the identification requirements as outlined in the 'How to prove your identity' leaflet

If you already have an account with Ecology, please quote your account number here

How did you hear about us? Friends or family  Already an Ecology member  Online search result  Social media

News article  Comparison/review site  Magazine (e.g. Ethical Consumer)  Events  Other  Please give further details:

## 5. use of your information

Ecology Building Society is the Data Controller of any personal data you supply.

The information you provide, we obtain through our dealings with you or about your account, will be held by the Society. We may use and share your personal information to help us provide the services you are applying for and to conduct an electronic search on you via the services of external agencies in order to confirm your identity and comply with money laundering regulations.

Under relevant data protection laws, you have a number of rights including the right to see and receive a copy of information held about you on our records and to ask for any inaccurate details to be corrected. We use your data in line with our Privacy Policy and Terms and Conditions which includes the potential consequences of third parties using your data. Please read our Privacy Notice:

[ecology.co.uk/homepage/privacy-notice](http://ecology.co.uk/homepage/privacy-notice)

If you have any questions about the relevant data protection laws or your rights under them, please write to the Data Protection Officer, Ecology Building Society, Ellis House, 7 Belton Road, Silsden, West Yorkshire BD20 0EE or email [DPO@ecology.co.uk](mailto:DPO@ecology.co.uk).

## 6. declaration

Each Trustee should read the following before signing.

1. I/We have read the section entitled 'use of your information' and understand the uses and disclosures of the information collected.
2. I/We declare that to the best of my/our knowledge and belief the information I/we have given on this form is true.
3. I/we declare that this amount is being invested in Ecology Building Society by me/us as trustee(s) on behalf of the beneficial owner.
4. I/We have read the *General Savings Terms and Conditions* and relevant *Product Conditions* and agree to be bound by them and the Rules of the Society for the time being in force (copies of which are available on request).
5. **Regular Savings account applications:** I/We understand that only two withdrawals can be made in a calendar year.
6. I/We declare that these funds are not held by me/us as Trustee(s), in any form, for Bodies Corporate.
7. We understand that in the event of death of one of us the remaining Trustee will maintain the account or if no trustees remain the estate will appoint a new Trustee.
8. I/We have received/downloaded and read the FSCS Information Sheet from the Society. **Please tick**
9. I/We confirm that I/we have read the Product Conditions and believe that this account is suitable for me/us.

## 7. signatures (of all applicants) Please sign to accept the declaration and apply.

Trustee one

Date

Trustee two

Date

For office use

Sort code    Account number

Party number

Initials

Date

**Return to:** Ecology Building Society, Ellis House, 7 Belton Road, Silsden, West Yorkshire BD20 0EE.

**Please note:** scanned copies are not accepted.