

Investment Application

For use by private individuals only. An additional application form should be completed where there are more than two account holders.

Important: Before completing this form please note the Society's Investment Terms and Conditions together with your chosen account terms and the Rules of the Society. In addition please read the notes under Customer Identification below.



IPSWICH
Building Society

Please complete this form in **BLOCK CAPITALS** and then **READ AND SIGN THE DECLARATION OVERLEAF**.
If you require any assistance in completing this form please contact us.

Account Information

Type of account _____

Opening Investment Cash £ _____ Cheques £ _____ * Total £ _____

I/We authorise you to transfer £ _____ from my/our Ipswich Account Number _____

Please indicate the number of signatures required for each withdrawal _____ Please enclose your passbook

* Cheques should be made payable to either the account holder or to Ipswich Building Society in respect of 'customer's name'
eg: Ipswich Building Society IRO Mr. R. Smith

First Named Account Holder

Mr/Mrs/Miss/etc _____ Surname _____ First Name _____ Middle Initials _____

Date of Birth (dd/mm/yy) _____ National Insurance No. _____

Address _____

Postcode _____

Telephone Number _____ Mobile _____

Email _____

Second Named Account Holder

Mr/Mrs/Miss/etc _____ Surname _____ First Name _____ Middle Initials _____

Date of Birth (dd/mm/yy) _____ National Insurance No. _____

Address _____

Postcode _____

Telephone Number _____ Mobile _____

Email _____

Interest Instructions

Please refer to the product leaflet for the available options. Please tick the appropriate box and enter the relevant account holder(s) details.

- Please add the interest to the account
- Please transfer the interest annually/monthly (delete as appropriate) to Ipswich Account Number: _____
- Please pay the interest direct to the Bank/other Building Society account below:
Name _____ Account Number _____ Sort Code _____
Bank/Building Society Name _____ Account Reference _____

Taxation of interest: In order to claim interest gross (ie. without the Society deducting income tax at the basic rate which it is normally obliged to do) a complete, valid Inland Revenue form R85 must be received and registered by every investor. (Please delete as appropriate.)

First Account Holder: I am eligible to receive interest gross **Yes / No** I attach completed R85 form(s) **Yes / No**

Second Account Holder: I am eligible to receive interest gross **Yes / No** I attach completed R85 form(s) **Yes / No**

Customer Identification

- **Existing customers** of the Society will not usually be required to prove their identity.
- For **new members** the following identification must be provided:
To open an account **in person:** Either your **Full UK Passport or Current Full UK Photocard Driving Licence**. Original documents will be required, a copy of which will be retained by the Society.
To open an account by **post or not in person:** Either a copy of your **Full UK Passport or Current Full UK Photocard Driving Licence** (do not send original documents by post) **AND** make your opening investment with a **Personal Cheque** (issued by your bank/building society bearing your name and account number).

Other forms of identification may be acceptable; Society staff will be happy to supply details. Lists of acceptable documents can be found in our Customer Information Leaflet. Alternatively we can complete an electronic check of your identity.

PLEASE READ THE AGREEMENT TO ASSIGN WINDFALLS TO CHARITY AND THE DECLARATIONS OVERLEAF BEFORE SIGNING THIS FORM

FOR OFFICE USE ONLY (must be completed in BLACK) Terms and Conditions have been supplied Branch/Agency code _____

FIRST ACCOUNT HOLDER

Existing Customer Call ML (Electronic check)
Driving Licence Passport Other
ID copies attached

SECOND ACCOUNT HOLDER

Existing Customer Call ML (Electronic check)
Driving Licence Passport Other
ID copies attached

Cheque Details - Personal Current Account? YES NO Face to face? YES NO

Customer No(s) 1st Acc Holder _____ 2nd Acc Holder _____ Account Type _____

Input by _____ Date _____ Checked by _____ Amended by _____ Account No. _____

