

# CASH INDIVIDUAL SAVINGS ACCOUNT (ISA) RENEWAL FORM

THE  
**FAMILY**  
BUILDING  
SOCIETY

To deposit into an existing Family Building Society Cash Individual Savings Account (ISA) - if you have not deposited in the current / previous tax year.

Please ensure that the existing ISA you wish to pay into is still accepting funds.

If unsure, you can call us on 03330 140144 with your existing account number to hand.

ACCOUNT DETAILS - PLEASE COMPLETE FULLY, IN BLOCK CAPITALS

## YOUR DETAILS

TITLE:	MR/MRS/MISS/MS	
SURNAME:		
FORENAMES:		
PERMANENT HOME ADDRESS:		
POSTCODE:		
LENGTH OF TIME AT ADDRESS:	Years	Months
HOME TELEPHONE:		
MOBILE TELEPHONE:		
EMAIL ADDRESS:		
DATE OF BIRTH:		
PLACE OF BIRTH:		
NATIONALITY:		
MARITAL STATUS:		
OCCUPATION:		
TAX IDENTIFICATION No:		

(only applicable to foreign nationals working in the UK)

## YOUR EXISTING CASH ISA WITH US

Please provide the existing Cash ISA account number you wish to make a subscription to:

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DO YOU HAVE A CASH ISA WITH ANOTHER ISA PROVIDER FOR THE CURRENT TAX YEAR?  YES  NO

If Yes, you will not be able to credit your ISA with the Family Building Society.

## YOUR INVESTMENT

This subscription relates to the tax year of:

Y	Y	Y	Y	/	Y	Y	Y	Y
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## CURRENT TAX YEAR INVESTMENTS

I ENCLOSE A CHEQUE FOR THE SUM OF:	£
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Cheques should be made payable to "Family Building Society" followed by your name and crossed "Account Payee Only".

AND / OR I WILL FORWARD A BANK TRANSFER FOR THE SUM OF:	£
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For our bank details, please see our website:  
[www.familybuildingsociety.co.uk/our-bank-details](http://www.familybuildingsociety.co.uk/our-bank-details)

## FROM AN EXISTING FAMILY BUILDING SOCIETY ACCOUNT

I APPLY TO TRANSFER:	ALL	PART
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OF MY FUNDS IN THE SUM OF:	£
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FROM ACCOUNT No:

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I WOULD LIKE TO PAY IN AT A LATER DATE USING A DEBIT CARD OR THE ONLINE SERVICE.

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

**THIS SECTION IS FOR SOCIETY USE**

**USE OF PERSONAL INFORMATION**

- 1 The Society will hold the information about you supplied on this form and obtained elsewhere on a computer or in any other way. Information about 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 the Family Building Society, FREEPOST, 30 Church Street, Epsom, Surrey, KT17 4BR.
- 2 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.
- 3 The Society may monitor or record any communications you have with us in the interests of staff training, customer service and security.
- 4 The Society may use your information to inform you (by post, telephone, fax 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.

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

**DECLARATIONS**

**1 GENERAL**

I 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 for a company or corporate body.
- 1.2 I agree to notify the Society of any changes to my personal details as set out overleaf.
- 1.3 The information supplied on this form is true and correct to the best of my knowledge and belief.
- 1.4 I have not subscribed and will not subscribe more than the overall subscription limit in total to a Cash ISA and a Stocks & Shares ISA in the same tax year.
- 1.4.1 I have not subscribed and will not subscribe to another Cash ISA in the same tax year that I subscribe to this Cash ISA.
- 1.5 All subscriptions made and to be made belong to me.
- 1.6 I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform the Family Building Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with a person who performs such duties.
- 1.7 I authorise the Family Building Society:
  - 1.7.1 To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those savings and any other cash.
  - 1.7.2 To make on my behalf any claims to relief from tax in respect of ISA investments.

**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.
- making the declarations and giving the authorities set out in the section “DECLARATIONS” above.

If you have any questions about the account terms and conditions please contact our Family Service Team on 03330 140144 or [savings.service@familybsoc.co.uk](mailto:savings.service@familybsoc.co.uk)

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

FIRST NAMED ACCOUNT HOLDER	SIGNED:		DATE:	DD	MM	YYYY
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**PLEASE RETURN THIS APPLICATION FORM TO:**

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

**FAMILY BUILDING SOCIETY ONLY ACCEPTS ORIGINAL COPIES OF THIS FORM BY POST AND CANNOT ACCEPT FAXED OR SCANNED COPIES.**

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