

APS Allowance Subscription Information

Please be aware that The Stafford Building Society will accept one payment in respect of the APS allowance into an APS ISA account. Once a payment to an APS allowance has been made no further payments will be accepted and if the full amount of eligible subscription has not been used, the unused allowance will be lost.

APS Eligibility Declaration

This section must be completed to confirm the investor named on this application is eligible to make additional permitted subscription to an ISA in respect of the deceased named on this application.

I (the investor) declare that:

- I am the surviving spouse / civil partner of the deceased
- I was living with the deceased within the meaning of Section 1011 of the Income Tax Act 2007 at the date of the deceased's death (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down)
- The subscription is made under the provisions of regulation 5DDA of the ISA regulations (Additional permitted subscription)
- The subscription is being made in the case of cash subscription, within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate) (where the deceased died in the period beginning with 3 December 2014 and ending on 5 April 2015, the deceased is treated as dying on 6 April 2015).
- I am aged 18 years of age or over
- All subscriptions made, and to be made, belong to me
- I the investor wish to subscribe: £
- Investment paid by: Cheque Cash Bank Transfer Transfer IN

I authorise The Stafford Building Society

- To hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
- To make on my behalf any claims to relief from tax in respect of ISA investments

Nominated Bank Account and Payment of monthly interest

The Society offers Members the option to make an electronic payment from their Stafford Building Society savings account to a nominated bank account in their own name via Faster Payment, free of charge (Limits apply. Please see our Tariff of Charges document for more details). This is limited to one payment per customer per working day. Members can register only one nominated bank account per account, which must be in the name of the Stafford Building Society savings account holder(s).

Nominated Account Details	This section must be completed if you wish to send faster payments from your Stafford Building Society account to a bank account in your name. If you have applied for a monthly interest account, you MUST complete this section as this is where your monthly interest will be paid away too.																							
Sort Code	<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"/>	<input type="text"/>	<input type="text"/>	Account Number	<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"/>
Card Holder(s) Full Name	<input type="text"/>																							
Bank Name	<input type="text"/>																							

(ONLY APPLICABLE IF APPLYING FOR A MONTHLY INTEREST ACCOUNT)

I confirm that this is my nominated account and is to be used as the destination account for interest to be paid away to Yes

Communications from the Society

Here at The Stafford Building Society ('Society', 'we'), we take your privacy seriously and will only use your email address to send you important updates about your account and membership. This includes essential information such as service notifications, changes to terms, Member events and Annual General Meeting (AGM) information. These communications are part of your membership and cannot be opted out of. If a valid email address is not provided, any major updates will be sent via post. If you contact the Society by email, please send any personal data securely.

You can also choose to receive marketing and community updates, which may include information about new Society products, member offers or news about the Society's community initiatives.

Marketing Preferences

You can change or cancel your choices at any time by contacting us at The Stafford Building Society, 4 Market Square, Stafford, ST16 2JH.

I confirm that the Society can contact me for marketing purposes:

Account holder 1

Post Email Telephone No Marketing

Disclosure of Relationships

Do you currently work for the Society?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you related to anyone who works for the Society?	<input type="checkbox"/> Yes <input type="checkbox"/> No

If you ticked "YES", what is your relationship?

Staff Member Name	Relationship

Do you need additional support?

We want every Member to feel supported. If there's anything we can do to make things easier for you, for example, if you're living with a health condition, disability, or other personal circumstances, please let us know so we can support you in the way that works best for you.

If you'd like a member of our team to get in touch, please tick below and select a preferred contact method – phone or email. We'll follow up as soon as possible to understand your needs and discuss how The Stafford Building Society can best support them.

Contact me via **telephone**

Contact me via **email**

Appendix 1 - Important Information - Use of Your Information

For the latest information on how we use your data, please refer to our privacy policy. This can be found on our website (www.srbs.co.uk/privacy-policy) or by asking for a physical copy from the branch staff.

Appendix 2 - Charitable Assignment Scheme

IF YOU HAD A SHARE ACCOUNT WITH THE SOCIETY ON 31st JULY 2000 AND HAVE HELD A SHARE ACCOUNT WITH THE SOCIETY EVER SINCE THAT DATE, OR IF YOU HAVE A MORTGAGE WITH THE SOCIETY AT TODAY'S DATE THE WORDING IN PARAGRAPHS 1 AND 2 BELOW DOES NOT APPLY TO YOU. HOWEVER, IT MUST NOT BE DELETED.

1) By applying to open a share account on or after 1st August 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 31st July 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 below).

This obligation 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 I/We will continue to be bound by the above condition even if the Society decides at some time in the future (and announces any such decision by press release or otherwise) 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.

2(a) "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 takeover) which is completed at any time within the ten years immediately following the date on which my/our share account is opened (or, if applicable, the shorter period as set out in the list available from the Society's Secretary). "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 takeover.

2(b) If the Society merges with any other society, after the date of such merger the "Society" includes such other society.

A list of the classes of persons which the Society currently wishes to be excluded from the obligation 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 Secretary.

The Stafford Building Society is a trading name for the Stafford Railway Building Society. The Stafford Railway Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Register Number 206063

Agreement and Declaration

The Society intends to rely on the Specific Terms for this account and the Savings Account Terms and Conditions (savings T&Cs), which together will form our agreement with you. Our current savings T&Cs are available online at www.srbs.co.uk and will be provided within your account opening pack. Before signing your agreement, for your own benefit and protection you should read the Specific Terms and Conditions for this account and the savings T&Cs. If you do not understand any point please ask for further information.

Your declaration - In signing this application form, you confirm the following declaration:

- I am resident in the United Kingdom for tax purposes, or if not so resident, either perform duties which by virtue of Sections 28 of the Income Tax (Earnings and Pension) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to or in civil partnership with a person who performs such duties.
- I will inform The Stafford Building Society if I cease to be so resident or to perform such duties or be married to, or in civil partnership with, a person who performs such duties.
- I am the sole beneficial owner of all the money to be invested in this account
- This account is not a bare trustee for a body corporate or for persons who include a body corporate (a bare trustee is someone who holds an account in his or her name, but the funds invested are for the absolute benefit of another person).
- I declare that the information I/we have given on this form is true to the best of our knowledge and belief and undertake to inform the Society of any changes in my/our circumstances.
- I agree to be bound by the Rules of the Society, the Society's Savings Account Terms and Conditions and any specific conditions applicable to this account (a copy of which I/we have received).
- To be bound by the rules of the Society and the Charitable Assignment Scheme described above in the application form and in our savings T&C's.
- I agree to the section called "Important - Use Of Your Information" including the Privacy Policy and agree to the Society using my information in the manner specified.
- I am aware that eligible deposits with The Stafford Building Society are protected by the Financial Services Compensation Scheme (FSCS).
- I have read the FSCS Information Sheet and understand that any deposits I hold above the current limit are not covered.

I confirm:

- That the information I have provided in the Tax Residency section of this form is correct at the time of signing this declaration
- That I will inform The Stafford Building Society of any changes in my circumstance, such as moving outside of the UK, which may affect the declaration and tax residency
- That I have received a copy of the Society's Privacy Notice and have had the opportunity to read this and ask any questions.
- That I have received a copy of the Financial Services Compensation Scheme information sheet and have had the opportunity to read this and ask any questions.

Signed - Account holder 1	
*Signature	
*Date	

Office Use ONLY

Member(s) CUID number(s)	
Account Number	
Completed by.....	Date..... Signature