Application Form – Cash ISA (UK individuals only)

The Stafford Building Society

Account Details – All sections marked with * are compulsory fields.

I apply to subscribe to a Cash ISA for the tax year 2026/2027 and each successive year until further notice (this does not mean that you are obliged to subscribe to your ISA in each successive year).

*I hereby apply for an	ISA Account
*Opening deposit amount	
*Source/origin of funds	
*Initial investment paid by	Cheque ☐ Cash ☐ Bank Transfer ☐ Debit Card ☐ ISA Transfer In ☐
	☐ Please transfer from my existing SRBS account (account number) ☐☐☐☐-☐☐☐☐☐-☐
*What are you saving for?	
*Roughly, how often do you plan to use your account?	Daily ☐ Weekly ☐ Fortnightly ☐ Monthly ☐ Annually ☐ Less than annually ☐
*Where will future deposits come from?	

Account Holder(s) Details

*Title		*Date of birth	
*First name(s)		*Country of birth	
*Surname		*National Insurance Number	
*Address		Previous address, if you have lived at your current address for less than three years	
Date moved to this address	M M Y Y Y Y	Date moved to this address	M M Y Y Y Y
Marital status		*Telephone	
*Occupation		Email	
Name of employer or your business name		*Nationality	
		*Country of residence	
*Are you a tax resident in any other country? (If **YES**, please state where & complete the supporting FATCA declaration leaflet)	Yes ☐ No ☐	*If **YES**, please include your Tax Identification Number (TIN)	

Nominated Bank Account

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.		
Sort Code	☐☐-☐☐-☐☐	Account Number	☐☐☐☐☐☐☐☐
Account holder's full name			
Bank Name			

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

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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 your 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 you.

Contact me by telephone to discuss any support needs	Account holder 1 ☐
Contact me by email to discuss any support needs	Account holder 1 ☐

Communications from the Society

Here at The Stafford Building Society ('the 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 you cannot opt out of them. If a valid email address is not provided, any major updates will be sent by 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?	☐ Yes ☐ No
Are you related to anyone who works for the Society?	☐ Yes ☐ No

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

Staff Member Name	Relationship

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 31 JULY 2000 AND HAVE HELD A SHARE ACCOUNT WITH THE SOCIETY EVER SINCE THAT DATE, OR IF YOU HAVE A MORTGAGE WITH THE SOCIETY AS 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 1 August 2000, I/we agree with the Society and the Charities Aid Foundation ("the CAF") that I will assign to the CAF (or to any charity or charities nominated by it or by the Society under the provisions of a deed dated 31 July 2000 between the Society and the CAF, in which case references to the CAF shall include references to any such charity or charities, but to no other person) the rights to any relevant conversion benefits (defined below).
This obligation will not apply to me if I fall within any class of persons that, as at today's date, the Society wishes to exclude from such an obligation. This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me/us.
I understand that neither the Society nor the CAF will release me/us from this agreement or vary its terms and I 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.

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2(a) "Relevant conversion benefits" means any benefits to which I 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 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.

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.

I declare that:

- All subscriptions made, and to be made, belong to me.
- I am 18 years of age or over.
- I have not subscribed or made payments, and will not subscribe or make payments, above the overall ISA subscription/payment limit across a Cash ISA, a stocks and shares ISA, an Innovative Finance ISA, and a Lifetime ISA in the same tax year.
- I am resident in the United Kingdom (UK) for tax purposes:
    - or, if not resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & 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 a resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- I agree to the ISA terms and conditions.
- I have read a copy of the Society's Privacy Notice and have had the opportunity to ask any questions. I am aware of how the Society uses my personal data and the rights I have under Data Protection Legislation (see Appendix 1).
- I have read and understood the Charitable Assignment Scheme (Appendix 2). I agree to be bound by the Rules of the Society and the Charitable Assignment Scheme described above, in the application form, and in my Savings Terms and Conditions.
- 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.
- 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.

Please read and tick below if applying for:

FIXED RATE CASH ISA: * I understand that if I am applying for a **Fixed Rate Cash ISA**, any withdrawals, closures, or transfers will be subject to a **90-day 'loss of interest' penalty**. There is a risk that the penalty charged for withdrawals within the first 90 days could be more than the interest accrued, meaning that you will get back less than you paid into your account. Full details of the penalties are contained in the product leaflet.	☐ (Tick to Confirm)
NOTICE CASH ISA: * I understand that if I am applying for a **Notice Cash ISA**, any transfers out of the account can be made without providing notice; however, such transfers will incur a **penalty charge equivalent to the notice period in interest.** No charges will apply if the required notice is given prior to withdrawal. There is a risk that if you transfer out within the first [notice period] days of opening a Notice Cash ISA, the penalty may exceed the interest earned. This means you could get back less than you paid in. For example, transferring without notice within 45 days of opening a Notice 45 ISA. Full details of penalties are available in the product leaflet and Cash ISA terms and conditions booklet.	☐ (Tick to Confirm)
* I confirm that I have read and understood the relevant product leaflet.	☐ (Tick to Confirm)

Authority

- I authorise The Stafford Building Society to hold my cash subscription and ISA investments, in respect of the interest, dividends and any other rights or proceeds and to claim any relief from tax on my behalf.

Signature

Account holder - I declare that this application form has been completed to the best of my knowledge and belief;	
*Signature	
*Date	

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