West Brom Cash ISA Application/Transfer form

Please insert product name:

Please ensure all boxes are completed in full, using black ink and BLOCK CAPITALS and sign as required. Incomplete or incorrect forms will cause a delay and may have to be returned to you and could also result in your application being rejected.

Title (e.g. Mr/Mrs/Ms):

Surname:

Forename(s):

Address:

Postcode:

NI number:

Date of Birth (DD/MM/YYYY):

Nationality:

Telephone number:

Email:

Occupation:

Estimated Annual Income:

You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP, or pension order book.

I wish to operate my account at: a branch ☐ by post ☐

Do you already have a savings or mortgage account with the Society? Yes ☐ No ☐ If **Yes**, please give one account number:

New ISA Investment (not ISA transfer)

I apply to subscribe for a cash ISA for the tax year 2025/2026 and each successive year until further notice, and make a subscription of £

(Min. Please refer to the account Specific Terms and Conditions. Max. £20,000 plus transfers from previous tax years)

(Please ensure cheques are made payable in your name. Please print your name and address on the reverse of the cheque.)

Transfer Application

I apply to transfer my existing ISA to the West Brom and subscribe to this cash ISA for the tax year 2025/2026 and each successive year until further notice.

If you are transferring an ISA from an external provider or a WeBSave ISA, please enter the approximate transfer amount here £ **and complete an ISA Transfer Letter of Authority** (we will not be able to request the transfer from your existing provider without this).

If you are transferring from another West Brom ISA please complete the details below.

Please transfer the following amount from account number

to a new West Brom ISA ☐ or to account number

a) The entire ISA ☐ Approximate balance £ or b) Part of the ISA ☐ Amount to be transferred £

If you are transferring part of the ISA and you have subscribed to the ISA in the current tax year, does the transfer include the current year's subscription? Yes ☐ No ☐

If your existing West Brom ISA is a fixed rate ISA, there may be a loss of interest as a result of the transfer. Please confirm whether you are happy to accept the loss of interest? Yes ☐ No ☐

Interest payment instruction*

☐ Please credit interest to my account.

☐ Please transfer interest to another West Brom Building Society account number:

Provided the account allows additional deposits.
(Please note that interest cannot be transferred to any WeBSave account)

☐ Please transfer interest direct to the UK bank/building society account under **withdrawals** opposite. (These details must be for the applicant named above). ***If no box is ticked, interest will be credited to your account.**

Withdrawals (inc. interest). Please make all electronic transfers into the following UK bank/building society account.

Name of bank/building society:

Address:

Postcode:

Sort code: – –

Bank account no:

Account reference no: (if appropriate)

Account holder name:

Please read: The product leaflet; the Society's General Terms and Conditions; the Specific Terms and Conditions; and this application form to which your account will be subject. For your own benefit and protection you should read the above carefully before signing this application form. All of the above are available at any of our branches and you can also find them on our website at www.westbrom.co.uk. If you do not understand any point please ask for further information prior to signing.

Declaration

I declare that:

1. I was 16 or above as at 5th April 2024;
2. I have not subscribed/made payment, and will not subscribe/make payments, more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA and a Lifetime ISA in the same tax year;
3. I have not subscribed and will not subscribe, more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year;
4. I have read the terms and conditions of the account in which I wish to invest which are set out in the product leaflet, General Investment Terms and Conditions leaflet, and this application form relating to the selected cash ISA account for which I am applying.
5. I agree that I will become a member of the Society and be bound by the rules of the Society. (You can get a copy of our rules at any of our branches and you can also find them on our website at www.westbrom.co.uk.)

points 6–9 are only applicable if you are also subscribing to this tax year:

6. All subscriptions made, and to be made, belong to me;
7. I have not subscribed and will not subscribe, more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year;
8. 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 West Bromwich 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.
9. I agree to the ISA terms and conditions.

I authorise West Bromwich Building Society

- to hold my cash subscription, 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.

I declare that this application form has been completed to the best of my knowledge and belief.

How we use your personal information

In order to process your application and manage your account, any information provided by you may be held by West Bromwich Building Society (as Data Controller) in our records and may be shared within West Bromwich Building Society Group of companies, as well as with Fraud Prevention Agencies. For further information about how we will use your personal information and your rights under Data Protection legislation, please read the Privacy Notice that has been provided to you which is also available at www.westbrom.co.uk/privacy-notice.

If you have any questions about the information provided, please write to the Data Protection Officer at West Bromwich Building Society, 2 Providence Place, West Bromwich B70 8AF.

Marketing Consent

The Society would occasionally like to keep you up to date with details of products and services by email, telephone or post. The Society will not sell your details to any company for their own use, but may pass on your details to i) its subsidiary companies and ii) mailing houses (who enable us to send our direct marketing communications to you).

If you would like to receive such direct marketing communications, please indicate by marking the box. ☐

You may withdraw your consent or change your preferences at any time by writing to: Data Protection Officer, West Bromwich Building Society, 2 Providence Place, West Bromwich B70 8AF. Alternatively, you can speak to our Customer Service team on 0345 241 3785 (we are open Monday to Friday 8.30am to 6.00pm; Saturday 8.30am to 12.30pm).

Please note that these instructions will supersede any existing consents currently held by the Society. These will also continue as your current marketing preferences unless you contact us and tell us otherwise.

I/We have read the section entitled Marketing Consent and by signing this form I/we consent to the uses and disclosures of information listed.

Additional Declaration For Charitable Assignment

Please read the section entitled 'Charitable Assignment' within the Society's General Terms and Conditions, to which your account will be subject. For your own benefit and protection you should read this section carefully before signing this application form. The Society's General Terms and Conditions are available at any of our branches and you can also find them on our website at www.westbrom.co.uk

N.B. Please note that you must sign and date below in order for us to process your application.

Warning – False statements may result in penalties or prosecution.
Important – Please ensure that you read the Specific Terms and Conditions relating to the relevant accounts before signing.

You **must** tick here to confirm that you have received the Customer Information Sheet containing details of the enhanced Depositor Protection Scheme. Failure to tick this box will result in a delay in the opening of the account. ☐

Signature Date

For office use only

Account no:

Cust 1 ID1:

Cust 1 ID2:

Date sent to EDM:

Opened by staff no. and signature: Date:

Checked by staff no. and signature: Date:

Reason for delay sending to EDM:

9567-04/25-01

• Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 • Tax Year 2025/26 •