

Account amendments form

Account number: Account number: Account number:

These amendments will be made to all accounts held with the Society

Name(s) of existing account holder(s) (in block capitals):

1st:

2nd:

New details

First account holder

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

Surname:

Forename(s):

Date of Birth (DD/MM/YYYY):

National Insurance number:

Address (Refer to Branch Support if customer has West Brom Mortgage):

Postcode:

Nationality:

E-mail:

Telephone number: (Daytime)

Telephone number: (Evening)

Mobile number:

Second account holder/signatory (Delete as appropriate)

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

Surname:

Forename(s):

Date of Birth (DD/MM/YYYY):

National Insurance number:

Address (Refer to Branch Support if customer has West Brom Mortgage):

Postcode:

Nationality:

E-mail:

Telephone number: (Daytime)

Telephone number: (Evening)

Mobile number:

Tax residency

Only complete the next section if you are an account holder changing address. (You **must** answer **ALL** questions.)

Section does not need completing by signatories.

First applicant account holder

1. Are you resident for tax purposes in **only** the UK? Yes ☐ No ☐
If **NO**, please provide details of the country(ies) where you are resident for tax purposes.

1 2 3

2. Are you a citizen of the United States of America (USA)? Yes ☐ No ☐
A USA citizen is deemed to be a tax resident of the USA, regardless of their country of habitation.

3. If you have answered **NO** to question 1 you must provide your tax identification number for every country that is listed for question 1 **apart** from the UK.

1 2 3

Second account holder

1. Are you resident for tax purposes in **only** the UK? Yes ☐ No ☐
If **NO**, please provide details of the country(ies) where you are resident for tax purposes.

1 2 3

2. Are you a citizen of the United States of America (USA)? Yes ☐ No ☐
A USA citizen is deemed to be a tax resident of the USA, regardless of their country of habitation.

3. If you have answered **NO** to question 1 you must provide your tax identification number for every country that is listed for question 1 **apart** from the UK.

1 2 3

If a tax identification number is unavailable you must provide the reason, either reason **A**, **B** or **C**, in the relevant box above. The reasons are as follows:

Reason A - The country where the applicant is liable to pay tax does not issue tax identification numbers to its residents

Reason B - The applicant is otherwise unable to obtain a tax identification number or equivalent number. (Please explain why you are unable to obtain a tax identification number in the below table if you have selected this reason)

Reason C - No tax identification number is required. (Please note: only select this reason if the authorities of the country of tax residence entered above do not require the tax identification number to be disclosed)

Please explain in the following boxes why you are unable to obtain a tax identification number if you selected Reason B above.

First account holder

1
2
3

Second account holder

1
2
3

If you are a tax resident of a country(ies)/jurisdiction(s) other than the UK and the UK has agreed to exchange information with that country(ies)/jurisdiction(s) then the West Brom has to forward relevant information about your account to HM Revenue and Customs (HMRC) and HMRC will pass the information to that country(ies)/jurisdiction(s). The West Brom does not give tax advice. If you have any questions about this form, these instructions, or defining your tax residency status, please speak to your tax adviser or domestic tax authority. You can also find out more, including a list of jurisdictions that have signed agreements to automatically exchange information, along with details about the information being requested, from the Organisation for Economic Co-operation and Development. Additionally, further information can be obtained from HMRC.

PLEASE COMPLETE THE REST OF THE FORM OVERLEAF

Reason for amendment

How many signatures are required for withdrawal?

Any one signature ☐ All signatures ☐

The reason(s) for the amendment are:

(tick appropriate box)

- ☐ Change of address
- ☐ Registration of marriage*
- ☐ Change of name
- ☐ Change/add date of birth
- ☐ Change/add National Insurance number
- ☐ Change/add new telephone number
- ☐ Joint account, any to withdraw
- ☐ Joint account, all to withdraw
- ☐ Signature update (identification attached if required)**
- ☐ Change of/add new email address
- ☐ Add correspondence address***
- ☐ Remove correspondence address

*Details of marriage registration

Existing title of account:

Marriage of:

Church of Registration District:

Date of Marriage:

Certificate Number:

**Signature update

Signature used prior to change of name i.e. by Deed poll or marriage:

***Correspondence address

First account holder ☐ Second account holder/signatory ☐

Postcode:

All account holders to sign

I/We agree to the revised account details on this form:

First account holder's signature:

Second account holder/signatory's signature (Delete as appropriate):

Date:

Date:

For office use only

Cust 1 ID1:

Cust 1 ID2:

Cust 2 ID1:

Cust 2 ID2:

Account no:

Correspondence address checked (name and staff no.):

IMN01 & IMN08 checked and amended if appropriate (name and staff no):

Amended by staff no. and signature: Date:

Checked by staff no. and signature: Date:

Date sent to EDM:

Reason for delay sending to EDM:

Head Office: 2 Providence Place, West Bromwich B70 8AF. www.westbrom.co.uk

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