

the West Brom - Power of Attorney application form for Mortgages

For office use only
Account no:

Updating existing account(s) – please provide all account numbers where the Power of Attorney is to be registered

Account no.

Account no.

LPA access code (if known):

Donor - Person Attorney is acting on behalf of.

Donor's details

Please indicate which address is to be used for correspondence in the 'Correspondence' section below

Address: _____

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

Surname: _____

Postcode: _____

Forename(s): _____

Email: _____

Date of birth (DD/MM/YYYY): _____

Telephone number: (Daytime) _____

Nationality: _____

Telephone number: (Evening) _____

Attorney – A person appointed by the Donor to act and make decisions on their behalf

First Attorney

Are you a solicitor/qualified person acting in a professional capacity?

Yes No

If Yes, please provide full details on a separate sheet

If No, please specify your relationship to the Donor: _____

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

Surname: _____

Forename(s): _____

Date of birth (DD/MM/YYYY): _____

Address: _____

Postcode: _____

Email: _____

Telephone number: (Daytime) _____

Telephone number: (Evening) _____

Mobile number: _____

Second Attorney (If applicable. Please use a separate sheet if more than two)

Are you a solicitor/qualified person acting in a professional capacity?

Yes No

If Yes, please provide full details on a separate sheet

If No, please specify your relationship to the Donor: _____

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

Surname: _____

Forename(s): _____

Date of birth (DD/MM/YYYY): _____

Address: _____

Postcode: _____

Email: _____

Telephone number: (Daytime) _____

Telephone number: (Evening) _____

Mobile number: _____

The Society will attempt to check your identity electronically based on the information you provide. By signing this form you give your consent for us to do this. If we are unable to do this, we will require documents to verify your identity. We will let you know if these are required.

Donor's capacity – Please give the reason why an Attorney(s) is/are required to operate this account:

Correspondence – Please advise which address is to be used for correspondence (please select one): Attorney 1 Attorney 2 Donor

How we use your personal information

In order to process this application and manage the account, any information provided by the Donor and the Attorneys 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 the Donor's and the Attorneys' personal information and the rights of the Donor and the Attorneys under Data Protection legislation, please read the Privacy Notice and Third Party Privacy Notice which have been provided to you which are 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 and the Donor up to date with details of products and services by email, telephone or post. The Society will not sell your / the Donor's details to any company for their own use, but may pass on your / the Donor's 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. Attorney 1 Attorney 2 Donor

You / the Donor 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 3784 (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 the Donor's current marketing preferences unless you contact us and tell us otherwise.

Declaration

I/We agree that the Donor will be bound by the rules of the Society and I confirm that I have the authority to make this declaration and that its terms shall apply equally to the Donor and (where possible and/or applicable) to me as Attorney of the Donor. (A copy of our rules is available at any of our branches and you can also find them on our website at www.westbrom.co.uk). I/We understand that the terms and conditions relating to this account set out in the Mortgage Terms and Conditions and the terms of this declaration apply to the Donor's mortgage and the subsequent conduct of the account. I/We understand that the information supplied by me/us is covered by the full provisions of the terms and conditions governing the account holder's relationship with the West Brom setting out how the West Brom may use and share the information supplied by me. We may need to verify your identity; our ID requirements can be found in our ID leaflet. I/We acknowledge that the information contained in this form and information regarding the account holder and any Reportable Account(s) may be provided to the tax authorities of the country in which this account(s) is/are maintained and exchanged with tax authorities of another country or countries in which the account holder may be tax resident pursuant to intergovernmental agreements to exchange financial account information. I/We declare that all statements made in this declaration are, to the best of my/our knowledge and belief, correct and complete with respect to both the Donor and, where applicable, to myself as authorised Attorney of the Donor. I/We undertake to advise the West Brom within 14 days of any change in circumstances which affects the tax residency status of the Donor identified in this form or causes the information contained herein to become incorrect, and to provide the West Brom with a suitably updated self-certification and Declaration within up to 14 days of such change in circumstances.

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.

Documentation – If the LPA access code for this Power of Attorney has been provided on this form and the Donor has not specified any special conditions on the Power of Attorney document we do not require the Power of Attorney document in order to proceed. If the LPA access code has not been provided, or the Donor has specified any special conditions on the Power of Attorney document we require the Power of Attorney document in order to proceed. This must be either the original Power of Attorney document or a certified copy. Certified copies must have the solicitor's signature, name, firm and address clearly legible on every page.

All Attorneys to sign

Attorney 1

Attorney 2

Attorney 1 signature: _____

Attorney 2 signature: _____

Date: _____

Date: _____

We authorise the Society to accept only the following for all purposes connected with this account: **Any one signature** **All signatures**
If neither box is ticked the Society will assume that ALL signatures are required.

Donor to sign (if applicable)

Donor signature: _____

Date: _____

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Account no:

Attorney 1 ID1: _____

Processed by staff no. and signature: _____ Date: _____

Attorney 1 ID2: _____

Attorney 2 ID1: _____

Attorney 2 ID2: _____

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

Calls and electronic communications may be monitored and/or recorded for your security and may be used for training purposes. Your confidentiality will be maintained.

West Bromwich Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Register No: 104877. 'the West Brom' and 'West Brom Building Society' are trading names of West Bromwich Building Society.

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West Brom
Building Society