West Brom Cash ISA Application/Transfer form P	lease inser	t product name:			
Please ensure all boxes are completed in full, using black ink an sign as required. Incomplete or incorrect forms will cause a dela returned to you and could also result in your application being r	iy and may				
Title (e.g. Mr/Mrs/Ms):	·	Date of Birth (DD/MM/YYYY):			
Surname:		Nationality:			
Forename(s):		Telephone number:			
Address:		Email:			
Postcode:		Occupation			
		Occupation:			
NI number:		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. Do you already have a savings or mortgage account with the Society? Yes 🗌 No		I wish to operate my account at: a branch by post I If Yes , please give one account number:			
New ISA Investment (not ISA transfer)					
apply to subscribe for a cash ISA for the tax year 2024/					
			ax. £20,000 plus transfers from prevame and address on the reverse of the che		
Transfer Application					
apply to transfer my existing ISA to the West Brom and subscribe	e to this cas	h ISA for the tax year 2024/2	025 and each successive year	r until further notice	
f you are transferring an ISA from an external provider or a WeBSave IS		•	•	and complete	
an ISA Transfer Letter of Authority (we will not be able to request the fi			_	and complete	
f you are transferring from another West Brom ISA please complete the					
lease transfer the following amount from account number					
o a new West Brom ISA 🗌 or to account number					
) The entire ISA 🗌 Approximate balance 🗜	or b) Part of	the ISA 🗌 Amount to be transf	erred £		
you are transferring part of the ISA and you have subscribed to the ISA				n? Yes 🗌 No 🗌	
your existing West Brom ISA is a fixed rate ISA, there may be a loss of nterest? Yes No	interest as c	a result of the transfer. Please co	nfirm whether you are happy to	accept the loss of	
Interest payment instruction* Withdrawals (inc. interest). Please make all electronic transfers into the following UK bank/building:				ilding society account.	
Diagon credit interact to my account		ank/building society:	nk/building society:		
Please transfer interest to another West Brom Building Society account number:	Address:				
Provided the account allows additional deposits.		Postcode:			
(Please note that interest cannot be transferred to any WeBSave account)	Sort code:		Bank account no:		
Under withdrawals opposite. (These details must be for the applicant		ference no: (if appropriate)			
		nt 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.		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.			
eclaration declare that:		Marketing Consent The Society would occasionally like to kee	Marketing Consent The Society would occasionally like to keep you up to date with details of products and services by email, telephor		
I was 16 or above as at 5th April 2024; I have not subscribed/made payment, and will not subscribe/make payments, more than the	The society would occasionally like to keep you up to date with aeraics of products and services by email, telephot or post. The Society will not sell your details to any company for their own use, but may pass on your details to i) it subsidiary companies and ii) mailing houses (who enable us to send our direct marketing communications to you				
subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance Lifetime ISA in the same tax year;	If you would like to receive such direct marketing communications, please indicate by marking the box.				
I have not subscribed and will not subscribe, more than the overall subscription limit in total to combination of permitted ISAs in the same tax year;	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				
I have read the terms and conditions of the account in which I wish to invest which are set or leaflet, General Investment Terms and Conditions leaflet, and this application form relating to	Customer Service team on 0345 241 3784 (we are open Monday to Friday 8.30am to 6.00pm; Saturday 8.30am to 12.30pm).				
cash ISA account for which I am applying. I agree that I will become a member of the Society and be bound by the rules of the Society. (Y		supersede any existing consents currently h preferences unless you contact us and tel			
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:		I/We have read the section entitled Mark	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.		
6. All subscriptions made, and to be made, belong to me;		Additional Declaration For Charitable Assignment			
 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; 		Please read the section entitled 'Charitable Assignment' within the Society's General Terms and Conditions, t which your account will be subject. For your own benefit and protection you should read this section carefully			
3. I am resident in the United Kingdom for tax purposes or, if not so resident, either preform 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 duties.		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			
l agree to the ISA terms and conditions. uthorise West Bromwich Building Society		Important – Please ensure that you rec before signing.	a me specific terms and Conditions relatin	ig to the relevant accounts	
to hold my cash subscription, ISA investments, interest, dividends and any other rights or pro	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.				
respect of those investments and any other cash; to make on my behalf any claims to relief from tax in respect of ISA investments.					
eclare that this application form has been completed to the best of my knowledge and b w we use your personal information					
order to process your application and manage your account, any information provided by you m		Signature	Date		
West Bromwich Building Society (as Data Controller) in our records and may be shared within We					
or office use only	Account no:				
ist 1 ID1:		Opened by staff no. and signature:		Date:	
ust 1 ID2:		Checked by staff no. and signature:		Date:	
te sent to EDM:		Reason for delay sending to EDM:			

Cust 1 ID2: Date sent to EDM:

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