

# Savings Application Form



## Personal details

For Joint Accounts, applicant 1 will be the Representative Joint Shareholder in line with our Rules and (if aged 18 or over) have voting rights. You can choose who you would like the Representative Joint Shareholder to be.

### Applicant 1

Title

First name(s)

Middle name(s)

Surname

Previous name

Date of birth

Address

Postcode

Nationality

Occupation

National Insurance number

Telephone number

Mobile telephone number

Email address

### Applicant 2

Title

First name(s)

Middle name(s)

Surname

Previous name

Relationship to applicant 1

Date of birth

Address

Postcode

Nationality

Occupation

National Insurance number

Telephone number

Mobile telephone number

Email address

## Tax residency status

Country of birth

Are you a citizen of any country outside the UK? Yes☐ No☐

Are you resident, for tax purposes, in any country outside the UK? Yes☐ No☐

Are you a citizen of the USA? Yes☐ No☐

Please list all countries, other than the UK, of which you are tax resident. Please also provide the relevant Tax Identification Number (TIN)

Country

TIN

Country of birth

Are you a citizen of any country outside the UK? Yes☐ No☐

Are you resident, for tax purposes, in any country outside the UK? Yes☐ No☐

Are you a citizen of the USA? Yes☐ No☐

Country

TIN

## Savings details

What account would you like to open?

Interest rate%

How much will you be depositing?

Deposits made by cheque should be payable to the account holder(s)

Source of Funds

Salary☐

Internal transfer☐

Savings / investment held elsewhere☐

Pension☐

House sale☐

Inheritance☐

Gift/loan☐

Other (please specify below)

How often will you fund your account? Weekly☐ Monthly☐ Annually☐ Rarely☐ No further deposits☐

OFFICE USE ONLY

V12. 5 December 2025

Date Opened		First Check		Second Check		Sample Check	
Customer Number		Identity (PIDE List 1)			Identity (PIDE List 2)		
Customer Number		Identity (PIDE List 1)			Identity (PIDE List 2)		

## Savings details continued

Where did you hear about us?

Social media

☐

In branch

☐

Friends and family

☐

Online comparison sites (please specify)

☐

Online search

☐

Other (please specify)

☐  

## Proving your identity

To comply with money laundering regulations and to protect our customers from fraud, we must confirm the identity and address of every applicant. We are able to access credit reference agency databases which, in most cases, will allow us to open your account without any paper-based identification. This will show as a search of the database only and not a credit score, so will not affect your credit rating. If we do need further proof of identification, we will let you know. If you are opening an account at one of our branches, you may want to bring two forms of ID with you, one form of identification for your identity and one for your address. To view our list of acceptable identification, please visit our website [www.thetipton.co.uk](http://www.thetipton.co.uk), ask a member of our team, or call us on 0121 557 2551. We will not carry out credit reference agency searches against customers under 18.

## Your declaration

For your own benefit and protection, you should carefully read the information and terms contained in this application form, including the declaration below, and the conditions relating to this account before signing the form. If you do not understand any point, please ask for further information.

In signing this application you confirm the follow declaration, I declare that:

- I/We declare that this application has been completed to the best of my knowledge and belief and I/We agree to inform the Society of any changes in my/our circumstances, such as moving outside the UK, which may affect this application;
- I/We agree to be bound by the Rules of the Society, the Special Conditions relating to the account opened and the Society's Terms and Conditions for Savings Accounts, a copy of which I have received and understood;
- I/We agree to the Society using my information in the manner specified in the Privacy Notice, a copy of which I have received and understood;
- I/We acknowledge receipt of the Financial Services Compensation Scheme Information Sheet which I/We received and understood prior to opening the account;
- I/We agree to the conditions relating to the Assignment of Windfalls to Charity as specified in the Charitable Assignments leaflet, a copy of which I have received and understood;
- The account is not being held by me/us as a bare trustee for a body corporate, or for persons who include a body corporate.

## Additional assistance

Should you require any additional help or assistance from the Society, please make us aware of how we can help:

## Keeping up to date with products and services

We use your information to make our communications as relevant and helpful as possible. We will never sell or share your data with third parties to try to sell you something. We think it's important to keep you informed when we launch new savings or mortgage products/services or have any news that may benefit you.

If you have any preferences on how you are contacted, please tick below.

### Applicant 1

Email Yes ☐ No ☐

Post Yes ☐ No ☐

Telephone Yes ☐ No ☐

Text message Yes ☐ No ☐

### Applicant 2

Email Yes ☐ No ☐

Post Yes ☐ No ☐

Telephone Yes ☐ No ☐

Text message Yes ☐ No ☐

You are in control of your preferences and can change your mind at any time. You can do this by visiting our website [www.thetipton.co.uk](http://www.thetipton.co.uk) to complete our online form, calling us on 0121 557 2551, emailing [info@thetipton.co.uk](mailto:info@thetipton.co.uk) or writing to 70 Owen Street, Tipton, West Midlands, DY4 8HG.

## Your signatures

### Joint Account Withdrawals

We authorise the Society to accept only the following for all purposes connected with this account:

Any one signature

☐

All signatures

☐

Any

☐

out of

☐

Signatures

If none of the above are completed, the Society will assume that **all** signatories are required. If you subsequently decide to change any signatories, a separate authority in writing by all account holders must be given before this can be effective.

By signing you indemnify us against any claim regarding such withdrawals. For joint accounts, each applicant must sign.

Applicant 1

Date

Applicant 2

Date

I hold a Power of Attorney/Court of Protection and sign on behalf of the Account holder.

☐

Once you have completed this form, please post it to our head office: Tipton & Coseley Building Society, 70 Owen Street, Tipton, West Midlands, DY4 8HG.