Fixed Rate ISA Application Form

Personal details

Title

First name(s)

Middle names

Surname

Previous name

Date of birth

Address

Postcode

Nationality

Occupation

National Insurance number

It is a requirement of the Scheme that you have a NI number. You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

If you do not have a NI number you must apply for one in order to open an ISA.

Telephone number

Mobile telephone number

Email address

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

Source of Funds

- Salary
- Savings / investment held elsewhere
- House sale
- Gift/loan
- Internal transfer
- Pension
- Inheritance
- Other (please specify below)

Where did you hear about us?

- Social media
- Friends and family
- Online search
- In branch
- Online comparison sites (please specify)
- Other (please specify)

Have you ever been convicted of a money laundering offence? Yes No

Failure to provide an honest answer may result in the Tipton & Coseley Building Society terminating your account.

Office use only

V14. 21 September 2026

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

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, 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.

I apply to subscribe to a cash ISA for the tax year 2026/2027 and each subsequent year until further notice.

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

- All subscriptions made, and to be made belong to me;
- I am 18 years of age or over;
- 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 Tipton & Coseley 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;
- I agree to the ISA Terms and Conditions;
- I have not subscribed/made payments, 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;
- I authorise Tipton and Coseley 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;
- I authorise Tipton & Coseley Building Society to make on my behalf any claims to relief from tax in respect of ISA investments;
- I declare that this application has been completed to the best of my knowledge and belief and I agree to inform the Society of any changes in my circumstances, such as moving outside the UK, which may affect this application;
- I 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 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 acknowledge receipt of the Financial Services Compensation Scheme Information Sheet which I received and understood prior to opening the account;
- I 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.

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.

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 to complete our online form, calling us on 0121 557 2551, emailing info@thetipton.co.uk or writing to 70 Owen Street, Tipton, West Midlands, DY4 8HG.

Your signatures

Signed

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.

ISA transfer in form

Office use only
Account number

Personal details

Title

First name(s)

Middle name(s)

Surname

Previous name

Date of birth / /

Address

Postcode

Nationality

National Insurance number

Telephone number

Mobile telephone number

Email address

Information about the ISA you want to transfer

Bank or Building Society

Address

Postcode

Sort code - -

Account number

Roll number (if applicable)

How much of your ISA do you want to transfer? All Part

What is the estimated amount you are transferring? £

Does this amount include current tax years subscriptions? Yes No If yes, how much? £

Please note, the amount in your ISA account representing current tax years subscriptions can only be transferred in whole and not part.

I instruct my current ISA provider to (please tick one):

Only go ahead with the transfer after the maturity date or at the end of the notice period for the ISA being transferred, whichever is applicable. I confirm that the funds will be available to transfer within 30 days; or

Carry out the transfer as soon as possible and I will accept any loss of interest or charges which may be applied as a result of this, subject to the terms and conditions of the ISA

Your Authority

I authorise my existing ISA provider to transfer the ISA (account number above) to Tipton & Coseley Building Society. I authorise my existing ISA provider to provide Tipton & Coseley Building Society with any information about the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

Signed

Date

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.

Transfer acceptance for office use only

V1.005 6 April 2026

Tipton & Coseley Building Society is willing to accept this ISA transfer in line with the customer's instructions above, as long as the following conditions are met:

1. The transfer proceeds are made up of cash deposits only
2. We must receive the transfer proceeds no later than: ☐☐ / ☐☐ / ☐☐☐☐
3. Where the customer has shown they want to transfer subscriptions from the current tax year, these must not be more than: £
4. For the purpose of the transfer of the ISA wrapper under the ISA regulations, the date shown here will be the transfer date. ☐☐ / ☐☐ / ☐☐☐☐

Date form received in branch: ☐☐ / ☐☐ / ☐☐☐☐