

Customer amendment form

To be completed when changing your name and/or address.



Personal details

Current details		New details	
Title		Title	
First name(s)		First name(s)	
Middle name(s)		Middle name(s)	
Surname		Surname	
Date of birth	D D / M M / Y Y Y Y	Date of birth	D D / M M / Y Y Y Y
Address	 	Address	
Postcode		Postcode	
Nationality		Nationality	
Occupation		Occupation	
Daytime number		Daytime number	
Evening number		Evening number	
Mobile number		Mobile number	
Email address		Email address	
National Insurance number		National Insurance number	
Tick to confirm that you have received a copy of our Privacy Notice		☐	

Tax residency status

Current Details		New Details	
Country of birth		Country of birth	
Are you a citizen of any country outside the UK?	Yes ☐ No ☐	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 resident, for tax purposes, in any country outside the UK?	Yes ☐ No ☐
Are you a citizen of the USA?	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		Country	
TIN		TIN	

Your accounts – please list all account numbers that you are linked to

Power of Attorney – to be completed if you hold a Power of Attorney for a member of the Society

Do you currently hold a Power of Attorney for a member of the Society? ☐

If yes, please confirm whether the correspondence address should be recorded as your address (as the attorney) or the donor's address.

Donor's address ☐ Attorney's address ☐

Attorney's address (if applicable)

Postcode

Additional assistance

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

Marketing of 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 declaration

In signing this amendment form, you confirm the following declaration:

- I agree to the Society using my information in the manner specified in the Privacy Notice, a copy of which I have received.

For changes by marriage, divorce, civil partnership or deed poll, please fill out both signature boxes below.

Current signature		New signature (Change of name only)		Dated	
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Proving your identity

We must 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 amend 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. These requirements will depend on how and where you are amending your personal data. We will not carry out credit reference agency searches against customers under 18.

We can accept photocopies of passports and driving licenses if they are certified by a professional and you must provide their contact details. Any documents that are certified must be dated and signed 'original seen' and photographic evidence should be certified as providing a good likeness.

Items used as proof of identity cannot be used as proof of address.

Evidence of identity when changing your name

- Passport
- A current photocard driving licence (full or provisional)
- Marriage - Marriage certificate
- Divorce - Decree absolute and birth certificate (when changing to their maiden name)
- Civil Partnership - Civil Partnership certificate
- Where a name has been changed by deed poll, we will accept enrolled and unenrolled Deed Polls. The Deed Poll is not accepted if the witness lives at the same address or is a close relative.

Evidence of identity when changing your address

- A current photocard driving licence (full or provisional)
- A firearms certificate or shotgun licence
- Valid old style UK driving licence
- Recent evidence of entitlement to a state or local authority funded benefit (including housing benefit and council tax benefit), tax credit, pension, educational or other grant (no older than 12 months)
- Instrument of a court appointment (such as liquidator, or grant of probate)
- Current council tax demand letter, or statement (no older than 12 months)
- Current bank or building society statement or passbook issued by a regulated financial sector firm in the UK, EU or comparable jurisdiction (must be no older than 3 months)
- Utility bill (recording the company that issued the bill and date of issue) (but NOT ones printed from the internet and must be no older than 3 months)
- Inland Revenue PAYE coding notice (P2) - current year or Inland Revenue Statement of Account - current tax year
- Solicitors completion letter/statement (must be less than 3 months old)
- Council tenancy agreement
- Private tenancy agreement
- UK mortgage statement (must be less than 12 months old)
- TV license renewal notification (must be less than 12 months old)
- UK phone bill (not mobile; must be less than 3 months old)
- UK satellite or cable bill if it includes landline phone connection (must be less than 3 months old)
- UK Credit Union statement (must be less than 3 months old)
- Letter from Manager of Nursing/Residential Home confirming permanent residence in nursing/residential home within the last 3 months - must be on letter headed paper
- Letter from commanding officer or military unit issued in the last 3 months and confirming residency in service quarters
- Online UK bank/building society current or savings account statements issued in the last 3 months (PDF download format print not a screenshot or photographic image)
- Online utility bill issued in the last 3 months (PDF download format print not a screenshot or photographic image).

Alternative evidence of address for under 18s:

- Adoption Certificate
- A NHS medical card
- Child benefit documentation
- Child Tax Credit documentation
- Written confirmation from HMRC containing National Insurance Number (for those aged 16 and over)
- Conditional or unconditional proof of acceptance onto qualifying course - letter or slip issued by UCAS (valid for current entry year)

OFFICE USE ONLY

V5.012 August 2026

Date of amendment		Customer number		ACHM		CUM		Initial	
Identity (PIDE List 1)				Identity (PIDE List 2)				Checked	