

APPLICATION

Cash ISA (standard & fixed rate)

Details

Membership Number (if applicable)	<input type="text"/>		
Title	<input type="text"/>		
First Name	<input type="text"/>		
Surname	<input type="text"/>		
Date of Birth	<input type="text"/>		
Permanent Residential Address	<input type="text"/>		
Telephone Number	<input type="text"/>	Email Address	<input type="text"/>
National Insurance (NI) Number	<input type="text"/>		

(You should be able to find your NI number on a payslip, P45 or P60, a letter from the Inland Revenue, a letter from the DSS, or pension order book).

Client identification

To enable Birmingham Bank to conform with current money laundering legislation, all applications must be accompanied with an original, current (not more than 3 months old) utility bill, council tax demand, or bank or building society or credit card statement, clearly stating the applicants full name(s) and current permanent address including postcode. All documents will be returned to you promptly.

Tick box to confirm documents enclosed

Terms and Conditions

Please tick the box to confirm that you accept the terms and conditions applicable to the Cash ISA you have chosen to open. It is important for you to read these as they reflect our agreement with you.

General Data Protection Regulations (GDPR)

This notice reflects how Birmingham Bank respects your privacy following the data protection legislation which came into force on 25th May 2018. As your bank, there are things we need to know about you - from your name and address to the payments in and out of your account. Keeping all of your information safe is a responsibility we take very seriously and that is why we have a Privacy Notice that spells out exactly what you can expect from us when it comes to your information.

Birmingham Bank Limited is a wholly owned company and how we use your data can be found in the 'How we process your data' section of the 'Birmingham Bank privacy' policy. This policy is available at: www.birminghambank.com/privacy

If you want to get in touch with us on this matter, our Data Compliance Officer can be contacted by email at gdpr@birminghambank.com or by post at **8th Floor, Lyndon House, 62 Hagley Road, Edgbaston, Birmingham, B16 8PE**. Data Protection No. **Z5691960**

Declaration - please ensure you have answered all the questions

- Option 1** I apply to subscribe for a cash ISA for the tax year 2022/2023 and each subsequent year until further notice.
- Option 2** I apply to subscribe for a 1 Year Fixed Rate Cash ISA for the tax year 2022/2023.
- Option 3** I apply to subscribe for a 2 Year Fixed Rate Cash ISA for the tax year 2022/2023.
- Option 4** I apply to subscribe for a 3 Year Fixed Rate Cash ISA for the tax year 2022/2023.

I declare that:

- All subscriptions made, and to be made, belong to me;
- I am 16 years of age or over;
- I have not subscribed and will not subscribe to or another cash ISA in the same year that I subscribe to this ISA;

and

- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, perform duties which, by virtue of Section 132(4)(a) of the Income and Corporation Taxes Act 1988 (Crown employees serving overseas), are treated as being performed in the United Kingdom, and will inform Birmingham Bank if I cease to be so resident and ordinarily resident or to perform such duties.

I authorise Birmingham Bank

- To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- To make on my behalf any claims to relief from tax in respect of ISA investments; and
- On my written request to transfer or pay to me, as the case may be, ISA investments, interest, dividends, rights or other proceeds in respect of such investments or any cash.

By returning this form you agree that we may process personal data about you where this is necessary. We may contact you about our services, and those of other companies within Birmingham Bank, which we believe may interest you, unless you have informed us that you do not want to receive this information. If you would prefer not to receive information about other services please advise us in writing.

I agree to the ISA terms and conditions. I declare that this application form has been completed to the best of my knowledge.

I wish to invest the cash sum as indicated in the box below and enclose a cheque made payable to Birmingham Bank in this respect (please note the cheque must be drawn on an account held in the same name as the account holder).

for £

or I wish to transfer my ISA from an existing provider and please forward a transfer form for completion in this connection. (tick box please)

Applicant's signature Date

For internal use only: Date Opened

**RETURNING
YOUR
APPLICATION****Print and Post**

Complete, sign and post to:
Birmingham Bank, 8th Floor, Lyndon House, 62
Hagley Road, Edgbaston, Birmingham, B16 8PE

Print and Scan

Complete, sign, scan and email to:
applications@birminghambank.com

Birmingham Bank is covered by the **Financial Services Compensation Scheme** established under the Financial Services and Markets Act (2000). Payments under the scheme are limited to a maximum payment to any one depositor of £85,000. Further details are available on request. Birmingham Bank is covered by the Financial Ombudsman Service. Details are available on request. It is a member of the Consumer Credit Trade Association and has adopted the CCTA Code of Practice 1995. English law will decide any legal questions about this agreement and the courts of England and Wales will also be able to deal with any legal questions connected with this agreement. *If you are under 18 years of age you will not be able to open a Stocks and Shares ISA.



Birmingham Bank
8th Floor, Lyndon House,
62 Hagley Road,
Edgbaston, Birmingham,
B16 8PE

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Birmingham Bank Limited, is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Finance Services Register No. 204478).

Registered office: 8th Floor, Lyndon House, 62 Hagley Road, Edgbaston, Birmingham, B16 8PE
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