SAVINGS ACCOUNT
Application Form

MANSFIELD BUILDING SOCIETY

If you are opening this account in more than two names, please ask for an additional application form.
Please use BLOCK CAPITALS and fill in all sections or tick boxes as appropriate.

1 ACCOUNT DETAILS

Account Name & Issue Number

The current maximum and minimum investments are shown in the Interest Rates and Account Summary

2 INVESTMENT AMOUNT

Please write the amount you wish to invest £

Cheques should be made payable to 'Mansfield Building Society' followed by the account name
(e.g. Mansfield Building Society - A B Smith)

3 PERSONAL DETAILS

First Named Account Holder

Title (Mr/Mrs/Miss/Ms/Mx/other)
First Name
Middle Name(s)
Surname
Date of Birth
Permanent Address
Postcode
Date occupied
National Insurance Number
Nationality
I am a citizen and tax resident of the UK only ☐ YES ☐ NO
If NO you will need to complete a separate tax residency self-certification form
Employment Type
Security Identifier*
*Required for security purposes and must be a word that is easily remembered but not known to any other party.
Telephone Day
Evening
Mobile
Email

Second Named Account Holder

Title (Mr/Mrs/Miss/Ms/Mx/other)
First Name
Middle Name(s)
Surname
Date of Birth
Permanent Address
Postcode
Date occupied
National Insurance Number
Nationality
I am a citizen and tax resident of the UK only ☐ YES ☐ NO
If NO you will need to complete a separate tax residency self-certification form
Employment Type
Security Identifier*
*Required for security purposes and must be a word that is easily remembered but not known to any other party.
Telephone Day
Evening
Mobile
Email

4 POSTAL ADDRESS

All information about the account will be posted to the address of the first named account holder if you want information posted to another address, please provide it here

Postcode

You can elect to receive your Annual General Meeting Voting Pack electronically (if eligible), which will help us to reduce our paper usage and postage costs. Please tick ONE box only.

☐ YES - I wish to receive my AGM Voting Pack electronically and I have supplied my email address above

☐ NO - I wish to receive a paper based AGM Voting Pack

5 INTEREST PAYMENT INSTRUCTIONS

Tick or complete **ONE SECTION ONLY**

A. Add interest to this account ☐ YES

B. Transfer interest to another Mansfield Account you hold

Account No.

C. Pay interest to my/our Bank Account in the name(s) of

Initials Surname
Account No
Bank Name Branch
Sort Code

SAVINGS ACCOUNT APPLICATION FORM

6 MORE INFORMATION

☐ **Individuals (sole name)** - I am investing the amount shown overleaf in Mansfield Building Society as sole beneficial owner and not as trustee or nominee for any other person or body of persons.

☐ **Joint Accounts** - We are investing in the amount shown overleaf in Mansfield Building Society as joint beneficial owners and not as trustees or nominees for any other person or body of persons.

☐ *Any one joint investor to sign* -We agree that either **or** any one of us may withdraw any or all of the money from the account and give good receipt to the Society. The Society may also rely on the signature of either **or** any one of us for any instruction or authority connected with this account.

☐ *All joint holders to sign* -We agree that all joint investors must sign in order to withdraw any or all the money from the account.

NB: (i) Where a joint investor dies, ownership of all money in the a count passes automatically to the surviving joint investor(s).

(ii) Only the first named joint investor will receive notices of meetings, statements and other correspondence relating to the account.

(iii) Only the first named investor may acquire voting rights in the Society, in accordance with the Rules.

(iv) You may at any time change the identity of the first named investor in the records of the Society by notifying the Secretary of the Society in writing at its Principal Office.

☐ **Nominee Accounts** - I am investing the amount shown overleaf in Mansfield Building Society as nominee. No company or other body corporate will have any beneficial interest in the amount invested in the Society.

☐ **Executor and Trustee Accounts** - I / We are investing the amount shown overleaf in Mansfield Building Society as Executor(s) or Trustee(s). No company, or other body corporate will have any beneficial interest in the money invested in the Society.

Name of Trust or Estate

NB: (i) Where the Executor or Trustee Account is in more than one name, the signatures of all joint investors are required for withdrawals.

(ii) Under heading "**All Joint Accounts**" apply to Executor and Trustee Accounts (i.e. first named investor to receive notices of meetings and statements, and to exercise voting rights, procedure for changing of first named investor).

(iii) The Society does not have any responsibility to see that the terms of any will or trust are complied with. Where there are two or more Executors/Trustees the account will pass to the survivor(s) automatically. Changes in trusteeship should be notified immediately

☐ **Power of Attorney** - I / We agree that we are investing the amount shown overleaf in Mansfield Building Society for and on behalf of (Please insert name and address of beneficial owner)

Name _____

Address _____

_____

_____

Postcode _____

under the Power of Attorney which I / we have produced to the Society.

I / We acknowledge that I / we act as agents only and the individual named above is sole beneficial owner of the investment in the Society.

Please note: Notices of meetings and statements will be sent to the holder of the Power of Attorney, who may exercise voting rights according to the Rules.

SOURCE OF FUNDS (e.g. Reinvestment of savings from elsewhere, inheritance, sale of property, shares, redundancy, pension lump sum)

PURPOSE (What are you saving for?)

EXPECTED FREQUENCY OF DEPOSITS (e.g. Weekly. monthly, one-off)

DATA PROTECTION - YOUR PERSONAL INFORMATION AND WHAT WE DO WITH IT

At Mansfield Building Society we take your privacy seriously. Personal information you provide to Mansfield Building Society and how we process this will depend on the products or services you apply for and (if your application is successful) obtain from us.

Full details of the types of personal information we collect from you, how we use, store and share this information, together with your individual rights, can befound in our Privacy Notice. It is important that you read the Privacy Notice.

The Privacy Notice can be accessed at mansfieldbs.co.uk, by picking up a copy from any of our branches or you can ask us to post you a copy.

IDENTIFICATION

For identification requirements please see our You & Your Savings Account leaflet

CANCELLATION PERIOD

If you are not happy about your choice of account, you may cancel it within 14 days of:

- the day you enter into the contract; or
- the day on which you receive the contract terms and conditions and other information on paper or electronically; whichever is later.

We will help you switch to another of our accounts or we will give you all your money back with any interest it has earned. We will ignore any notice period and any extra charges.

SAVINGS ACCOUNT APPLICATION FORM

6 MORE INFORMATION (Continued)

IF YOU HAD A SHARE ACCOUNT WITH THE SOCIETY ON 5 APRIL 2000 AND HAVE KEPT A SHARE ACCOUNT EVER SINCE THAT DATE, OR IF YOU HAVE A MORTGAGE WITH THE SOCIETY AT TODAY'S DATE, THE WORDING IN PARAGRAPHS 1 TO 3 BELOW DOES NOT APPLY TO YOU, HOWEVER IT MUST NOT BE DELETED.

1. By applying to open a share account on or after 6 April 2000 I/we agree with the Society and the Charities Aid Foundation (the CAF) that I/we will assignto the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 5 April 2000 between the Society and the CAF, in which case references to the CAF shall include references to any other charity(ies), but to no other person) the rights to any relevant conversion benefit (defined below).This obligation will not apply to me/us if I/we fall within any class of persons which, as at today's date, the Society wishes to be excludedfrom such obligation.This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me/us. I/we understand that neither the Society nor the CAF will release me/us from this agreement or vary its' terms and (except as set out in paragraph 2 below) I/we will continue to be bound by the above condition even if the Society decides at some time in the future (and announces any such decision by press release) that it is no longer in the best interests of the Society to continue with the above assignment condition generally in respect of new members.

2a. "Relevant conversion benefits" means any benefits to which I/we might become entitled as a shareholding member of the Society under the terms of any future transfer of the Society's business to a company (i.e. on a conversion or takeover) which is completed at any time within five years immediately following the date on which my/our share account is opened (or, if applicable, the shorter period as set out in the list available from the Society's Secretary)."Relevant conversion benefits" does not include the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company on a conversion or takeover.

2b. If the Society merges with any other society, after the date of such merger the "Society" includes such other society.

3. I/we authorise the Society to pass to the CAF such information relating to me/us and my/our accounts with the Society as the CAF may reasonably require in order to administer this agreement to assign and the relevant conversion benefits and for no other purpose. I/we consent to both the Society and the CAF holding and processing such information for such purposes.

A list of the classes of persons which the Society currently wishes to be excluded from the obligation to assign or in respect of which a shorter period applies (which list may change from time to time but not with retrospective effect) is available on request from the Society's Secretary at its' Principal Office.

7 DECLARATION & SIGNATURE

All Accounts

1. I / We understand that the operation of this account will be governed by the Terms and Conditions for the specific product chosen and by the General Account Terms and Conditions. I / We understand that it is my / our responsibility to read these carefully and to ask for clarification if there is anything in them that I / we do not understand. Copies of the specific Product Terms and Conditions and General Account Terms and Conditions are available on request from any of our branches or can be viewed on our website mansfieldbs.co.uk

2. I / We agree to be bound by the Rules of the Society. Copies of the Society's Summary Financial Statement are available on request from any of our branches or can be viewed on our website mansfieldbs.co.uk. Copies of the Society's Memorandum and Rules are available on request from the Principal Office of the Society.

3. I / We understand that by signing this application form I / we confirm that I / we have read in full the Privacy Notice of the Society. A copy of the Privacy Notice is available on request from any of our branches or can be viewed on our website mansfieldbs.co.uk.

4. I / We acknowledge and understand that in order to process my / our application, the Society may perform identity checks on me / us, with one or more Credit Reference Agencies (CRAs) and/or Fraud Prevention Agencies (FPAs) who will supply information, including information from the Electoral Register for the purpose of verifying my / our identity/identities and my / our address(es). For joint applications (e.g. spouses, partners or family members), we understand that CRAs/FPAs will link our records together and these links will remain on our files, until such time as we successfully file for a 'disassociation' with the CRAs/FPAs to break that link.

5. **I / We have received, read and understood the Financial Services Compensation Scheme Information Sheet** ☐
A copy of the Financial Servoces Compensation Scheme Information Sheet is available on request from any of our branches or can be viewed on our website mansfieldbs.co.uk.

First Named Investor Signature _____ Date ☐☐ ☐☐ ☐☐☐☐

Second Named Investor Signature _____ Date ☐☐ ☐☐ ☐☐☐☐

All applicants must sign - applications will not be accepted without all signature(s)

Would you like to receive information about our other products and services?

From time to time we would like to contact you with details of other products and services we provide, including our community activities and latest news.

If you consent to us contacting you for this purpose, please tick to say how you would like us to contact you. Please note this will supercede any previously given consent.

First Named Acccount Holder

Post ☐ Email ☐ Telephone ☐ Text Message ☐

Second Named Acccount Holder

Post ☐ Email ☐ Telephone ☐ Text Message ☐

Please ensure you have provided us with the relevant contact details in section 3 & 4 to enable us to contact you through your preferred method(s).

You can update your marketing preferences or stop receiving marketing from us at any time by writing to us at Regent House, Regent Street, Mansfield, Nottinghamshire NG18 1SS, calling us on 01623 676300, visiting any of our branches, completing the online form at mansfieldbs.co.uk or by following the instructions on how to update your preferences in any marketing email or other communication that you receive from us.

SAVINGS ACCOUNT APPLICATION FORM

FOR OFFICE USE ONLY

Existing Customer(s) YES / NO Matched YES / NO / N/A

Customer Number(s) Account Number

Where did the customer hear about MBS?

Additional Deposits / Access Required / Funds Elsewhere? Accessible?

Saving For / Other Needs Identified

☐ Source of Funds Text added ☐ AGM Preference updated

☐ Charitable Assignment Completed ☐ Marketing Consents updated

Opened By Date Checked By Date

Scanned ☐ Scan Checked ☐

MANSFIELD BUILDING SOCIETY

Regent House, Regent Street, Mansfield, Notts NG18 1SS
t: 01623 676350 e: enquiries@mansfieldbs.co.uk w: mansfieldbs.co.uk

The Mansfield Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Reference number 206049

MANSFIELD BUILDING SOCIETY

Financial Services Compensation Scheme
Information Sheet

The Financial Services Compensation Scheme (FSCS) protects deposits made by most individuals and businesses. Your account statement will confirm whether your deposits with Mansfield Building Society are eligible for FSCS protection. Details of certain exclusions from the FSCS's protection are set out in the exclusions list after this information sheet.

Limit of protection
£120,000 per depositor per bank, building society or credit union.

If Mansfield Building Society goes out of business the eligible deposits with Mansfield Building Society will be added up and the £120,000 will be applied to the total balance. For example, if you hold a savings account with £80,000 and a current account with £50,000, FSCS will pay you £120,000 and you may lose £10,000.

To ensure the FSCS can pay you promptly please ensure that Mansfield Building Society has your up-to-date contact details including your email address.

Joint and group accounts
Each eligible account holder is entitled to £120,000 protection in total. For example, if there are two account holders, you will each be entitled to £120,000 protection, giving a total of £240,000.

Eligible deposits in business accounts are treated as if made by a single depositor. This means these types of account will only be protected up to £120,000.

Temporary high balances
If you have a 'temporary high balance' you may be entitled to more than £120,000 protection for six months from when the amount was first deposited or legally transferred. Temporary high balances are deposits connected with certain events, including:
(a) Transactions relating to the purchase and sale of your main home.
(b) Major life events such as death, your marriage or civil partnership, divorce, retirement, redundancy, disability or incapacity.
(c) Compensation for personal injuries or wrongful conviction.

How the FSCS will pay you
FSCS will typically return deposits within seven business days by cheque or electronic payment into an alternative account. Payments may take longer in exceptional circumstances, for example if there is a temporary high balance, or the deposit is held on behalf of underlying beneficiaries.

Contact details for further questions about your account	Mansfield Building Society Regent House, Regent Street Mansfield, Nottinghamshire NG18 1SS Tel: 01623 676350 **www.mansfieldbs.co.uk**
Contact details for more information on FSCS protection	You can find more information on FSCS protection on its website at **www.fscs.org.uk** or by contacting the FSCS using the details below: Telephone: 0800 678 1100 Email: enquiries@FSCS.org.uk

MANSFIELD BUILDING SOCIETY

Financial Services Compensation Scheme
Exclusions List

As set out in the Depositor Protection Information Sheet, deposits held by individuals and businesses will be generally eligible for FSCS protection up to the compensation limit. However, some exclusions do apply. Details of the most common exclusions are set out below. For full details of the exclusions please see the Depositor Protection Part of the PRA Rulebook.

A deposit is excluded from protection if it meets any of the following criteria:

(1) The account holder is:

- a credit institution
- a financial institution
- an investment firm
- an insurance undertaking
- a reinsurance undertaking
- a collective investment undertaking
- a pension or retirement fund
- a public authority, other than a small local authority.

Note that:

(a) Deposits held on behalf of underlying beneficiaries who are eligible for FSCS protection, are not excluded.

(b) Personal pension schemes, stakeholder pension schemes or occupational pension schemes for micro, small and medium sized companies are not excluded.

(2) It is not held at a UK establishment of a bank, building society or credit union. Or, in the case of a bank, building society or credit union incorporated in the UK, it is not held at an establishment in Gibraltar.

(3) The deposit is involved in any transactions where there is a link to a criminal conviction for money laundering. For example, it is transferred from an account held by someone who has been convicted of money laundering