

# Young Savers Account Application

For use by private individuals based in Wales only.  
Corporate bodies should ask for the appropriate form.

**SWANSEA**  
BUILDING SOCIETY

www.swansea-bs.co.uk

## Important:

Before completing this form please read the specific conditions for each and every account you are opening and the 'General Terms and Conditions for the Operation of Savings Accounts' leaflet. These provide important information about your account with the Society. In addition please read the form 'Proving Your Identity'.

Please complete this form using BLOCK CAPITALS and then read and sign the Declaration on the reverse. If you require any assistance in completing this form, please call our savings department on 01792 739100.

- If the child is under 11 years old, the adult opening the account must complete the child's applicant section on behalf of the child, and also the Parent/Guardian sections.

## Account information

I/We would like to open the account(s) - With

£

Make cheques payable to the name of the account holder

Please indicate signatory instructions: Child only (11+); Parent/Guardian and Child (11+);  
Either Parent/Guardian or Child (11+); Parent/Guardian only

## Account Holders

Applicant details to be completed by child if 11+ years of age,  
otherwise child's details to be completed by an adult.

Parent/Guardian details to be completed by an adult only if the  
child is under 11 years of age.

## Applicant

|   |                     |                 |         |
|---|---------------------|-----------------|---------|
| Are you an existing customer? (Y/N)   |                     |                 |         |
| Title (Mr/Mrs/Etc.)   |                     |                 |         |
| Forename(s) in full   |                     |                 |         |
| Surname   |                     |                 |         |
| Current Address   |                     |                 |         |
|   |                     |                 |         |
| Postcode  |                     | Time at address | Y Y M M |
| Previous Address<br><i>Only complete if you have lived at current address for less than 3 years</i> |                     |                 |         |
|   |                     | Postcode        |         |
| Date of Birth   | D D / M M / Y Y Y Y |                 |         |
| Home Phone (+ Code)   |                     |                 |         |
| Work Phone (+ Code)   |                     |                 |         |
| Mobile Phone (+ Code)   |                     |                 |         |
| email Address   |                     |                 |         |
| Nationality   |                     |                 |         |
| Are you resident for tax purposes only in the UK? (Y/N)   |                     |                 |         |
| Are you a citizen only of the UK? (Y/N)   |                     |                 |         |
| Occupation*   |                     |                 |         |
| Employer*   |                     |                 |         |
| Reason for opening the account  |                     |                 |         |
| Source of opening deposit/future funds  |                     |                 |         |
| Expected frequency of account use   |                     |                 |         |
| Relationship to Parent/Guardian   |                     |                 |         |

## Parent/Guardian

|   |                     |                 |         |
|---|---------------------|-----------------|---------|
| Are you an existing customer? (Y/N)   |                     |                 |         |
| Title (Mr/Mrs/Etc.)   |                     |                 |         |
| Forename(s) in full   |                     |                 |         |
| Surname   |                     |                 |         |
| Current Address   |                     |                 |         |
|   |                     |                 |         |
| Postcode  |                     | Time at address | Y Y M M |
| Previous Address<br><i>Only complete if you have lived at current address for less than 3 years</i> |                     |                 |         |
|   |                     | Postcode        |         |
| Date of Birth   | D D / M M / Y Y Y Y |                 |         |
| Home Phone (+ Code)   |                     |                 |         |
| Work Phone (+ Code)   |                     |                 |         |
| Mobile Phone (+ Code)   |                     |                 |         |
| email Address   |                     |                 |         |
| Nationality   |                     |                 |         |
| Are you resident for tax purposes only in the UK? (Y/N)   |                     |                 |         |
| Are you a citizen only of the UK? (Y/N)   |                     |                 |         |
| Occupation  |                     |                 |         |
| Employer  |                     |                 |         |
| Reason for opening the account  |                     |                 |         |
| Source of opening deposit/future funds  |                     |                 |         |
| Expected frequency of account use   |                     |                 |         |
| Relationship to Applicant   |                     |                 |         |

\* If child is over 16

# Interest instructions

Interest is added to the account annually.

## Declaration

I declare and agree that:

- (a) I confirm that I have read: (i) any marketing literature relating to the account I am opening and (ii) the 'General Terms and Conditions for the operation of Savings Accounts' and agree to be bound by them and the Rules of the Society (copies of which are available upon request) and any subsequent Terms and Conditions and Rules for the time being in force.
- (b) The money I am investing in this account is my own (unless the account is for a child under 11, when the money belongs to that child).

### Your personal information

- (c) For the purpose of data protection legislation, the Society is the organisation responsible for the processing of my personal information. I understand that I have various rights in relation to my personal information, including the right to request a copy of the details held about me by the Society and, where necessary, for inaccurate information about me to be corrected.
- (d) I understand that my personal data may be processed for the purposes of: opening and administering my account, contacting me where necessary, fraud prevention and detection, legal and regulatory compliance, marketing and market research, statistical analysis and after closure of the account for statutory, regulatory, accounting, auditing or other lawful requirements. Further details of how the Society will handle my personal information can be found at: [www.swansea-bs.co.uk/about-swansea-building-society/privacy-information](http://www.swansea-bs.co.uk/about-swansea-building-society/privacy-information)

### Using your personal information for marketing

- (e) The Society wishes to use your personal information to send by post information about products or services which may be of interest to you. If you do not wish to receive such information by post, please tick this box.

Even if you do tick this box, we will still send you important information about your account through the post when we are required to do so (for instance, annual statements, changes to interest rates or information about our AGM).

- (f) The Society would also like to keep in touch with you by telephone, text and/or email to tell you about our products or services. I consent to receiving marketing from the Society by:

Email  Text  Telephone

I understand that I can change my mind and request NOT to receive any details about the Society's products and services by contacting the Society at 11/12 Cradock Street, Swansea SA1 3EW 01792 739100.

## The Financial Services Compensation Scheme (FSCS)

I/We confirm receipt of the information sheet relating to The Financial Services Compensation Scheme

|                    |  |      |  |
|--------------------|--|------|--|
| (Applicant) Signed |  | Date | <input type="text" value="D D"/> / <input type="text" value="M M"/> / <input type="text" value="Y Y Y Y"/> |
|--------------------|--|------|--|

|                          |  |      |  |
|--------------------------|--|------|--|
| (Parent/Guardian) Signed |  | Date | <input type="text" value="D D"/> / <input type="text" value="M M"/> / <input type="text" value="Y Y Y Y"/> |
|--------------------------|--|------|--|

## For Society use only

|                    |                      |                      |                      |                      |         |  |
|--------------------|----------------------|----------------------|----------------------|----------------------|---------|--|
| Account Title      |                      |                      |                      |                      |         |  |
| Customer Number(s) |                      |                      |                      |                      |         |  |
| Account Number     | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | Scanned |  |
| Initials           |                      |                      |                      |                      | Date    | <input type="text" value="D D"/> / <input type="text" value="M M"/> / <input type="text" value="Y Y Y Y"/> |