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Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority firm reference 213704

# Joint Savings Membership Application Form

Please complete this form in full. If you need any help completing the form give us a call on 01837 658123

Service point

## About You

Full name (including title)

### 1<sup>st</sup> Applicant Address:

Post Code

Date of birth:  DD  MM  YY

National insurance number:

Home Phone

Work Phone

Mobile Phone

Email address

Date of birth:

National insurance number:

Home Phone

Work Phone

Mobile Phone

Do you wish to Save by Standing Order? Yes  No

If Yes please fill in a Standing Order Instruction (Included with your application)

Do you wish to Save by Cash/ Cheque at Service Point

Initial deposit paid? Amount: £.....:..... (£4.00 is payable to open an account: £3 for the joining fee and £1 initial deposit, please also note that a £3.00 membership fee will be deducted annually).

I would like to apply for a credEcard visa prepaid debit card  (see information attached)

Type of savings account to be opened (you can choose more than one)

Regular saver  Special Occasion  Christmas saver

Only our regular saver account can be used as collateral against a loan

If you would like more than one savings account please indicate below the amount you would like to save in each account. When we receive your standing order or you pay at your local service point we will automatically split the amount as indicated below into the different accounts;

Regular Saver £..... Special Occasion £..... Christmas saver £.....

**Death Benefit Nomination Form:** In the event of your death whilst you are a member of the credit union, you can choose for the balance of your account to be paid to the individual/organization named in the section below. You can of course nominate Plough and Share as your beneficiary, any monies we receive is used for the benefit of our members.

<b>Form of Nomination</b>	
<b>We,</b>	<b>(Full Names)</b>
<b>Hereby nominate</b>	
	<b>(Full Name)</b>
<b>of,</b>	<b>(Address)</b>
<b>Relationship (if any)</b>	
<b>As the beneficiary of the value of my shares in our credit union</b>	
<b>Signed:</b> <b>(1<sup>st</sup> Applicant)</b>	<b>Date:</b>
<b>Signed:</b> <b>(2<sup>nd</sup> Applicant)</b>	<b>Date:</b>
<b>Witnessed by (cannot be the beneficiary)</b> <b>Signed:</b>	<b>Date:</b>

### Signatories:

Please indicate below the signatories required to update personal details on your joint account, eg change of address, telephone numbers.

One signatory required to update personal details

Two signatories required to update personal details

Please indicate below the signatories required to withdraw funds from your joint account

One signatory required to withdraw funds

Two signatories required to withdraw funds

One signatory to transfer funds between accounts

Two signatories to transfer funds between accounts

**Please note that to close an account we will need both parties to sign a closure form**

## Declaration

In signing the application form I declare that:

- The information I have given on the form is true and accurate, and I will notify the credit union if any of the information changes.

Signed

Date

Signed

Date

For security purposes when you telephone us. Please enter a memorable 6 character word

## Data Protection

In accordance with the principles of the Data Protection Act 1998 we will use your personal details for the purposes of managing your accounts with the credit union. Your personal details will be treated confidentially and will only be shared with other agencies for the purposes of application processing, to prevent crime or fraud, or where legally required to do so. We may use information for reporting to funders or those for whom we provide services, but such information will be anonymised and will not personally identify you. You have the right to see the information we hold about you, for which we may charge a fee.

**In order to open an account one of each document type must be provided as ID from both applicants:**

Document Type 1	Document no./ref	Date Seen	Seen By
Valid Photo card Driving Licence			
Valid Current Passport			
Current Firearms Certificate/Shotgun License			
I.D. card issued by the Electoral Office for Northern Ireland.			
Valid (old style) full UK driving License			
Recent evidence of entitlement to a state or local authority-funded benefit.			
<b>PLUS one of: Document Type 2</b>			
Instrument of court appointment (liquidator, probate etc)			
Current Council Tax demand letter/statement			
Signed UK Tenancy Agreement for current or previous address.			
Current UK financial institution issued bank/credit card statement. (not from the internet and not more than 3 months old.			
Utility Bill (not from the internet) issued within the last 3 months.			

### For office and service point use only:

Date Received:

Membership Number Allocated:  Date

Membership book allocated: By service point YES/NO By office: YES/NO  
Member pack sent: By service point YES/NO By office: YES/NO