

CASH JUNIOR INDIVIDUAL SAVINGS ACCOUNT APPLICATION FORM

APPLICANT- I APPLY TO OPEN A JISA FOR THE CHILD

Cust No.

Title (MR/MRS/MS/MISS)

Forenames and surnames (forenames after the first can be represented by initials)

Date of Birth

Permanent residential address

Postcode

Telephone Home

Business

Nationality

DETAIL OF CHILD

Child's title (if any)

Forenames and surnames (forenames after the first can be represented by initials)

Child's permanent residential address

Postcode

Child's date of birth

PERSONAL DETAILS

Does the child have a National Insurance (NI) Number? Yes No

If Yes, you must enter it here

AGREEMENT TO ASSIGN

EVER SINCE THAT DATE, OR IF YOU HAVE A MORTGAGE WITH THE SOCIETY AT TODAY'S DATE, THE WORDING IN PARAGRAPHS 1-3 BELOW DOES NOT APPLY TO YOU, HOWEVER IT MUST NOT BE DELETED. PLEASE LIST YOUR SHARE/MORTGAGE ACCOUNT NUMBER(S)

- By applying to open a share account on or after 1 December 2000, I/we agree with the Society and the Charities Aid Foundation ("the CAF") that I/we will assign to the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 30 November 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 benefits (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 excluded from 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 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 or otherwise) 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.
- (a) "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 (ie on a conversion or takeover) which is completed at any time within the 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.
(b) If the Society merges with any other society, after the date of such merger the "Society" includes such other society.
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.
- may change from time to time but not with retrospective effect) is available on request from the Society's Secretary at its principal office.

Account No.

Name

DATA PROTECTION

Information which you provide to Beverley Building Society or that is obtained by us through our dealings with you may be held on our computers and in other ways and used by us to administer your account, for statistical analysis, for debt collection and fraud prevention and to bring to your attention (by mail, telephone, e-mail or otherwise) products or services of the Beverley Building Society or other selected suppliers which may be of interest to you. Where applicable, with respect to your agreement to assign, to the Charities Aid Foundation or its successor(s) (the CAF), your rights to any relevant conversion benefits, we will pass on to the CAF such limited information related to you and your account as may be necessary to fulfil your agreement to assign. Such information shall only be passed on to the CAF in the event that Beverley Building Society is to transfer its business to a company (i.e. on a conversion or takeover).

I DECLARE THAT

- The child named on this application will be the beneficial owner of the account investments
- I am 16 years of age or over
- I am the child or I have parental responsibility for that child (delete which does not apply)
- I /or the child (delete which does not apply) does not have a Child Trust Fund account
- I will be the registered contact for the JISA
- The child is resident and ordinarily resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a civil partnership with a UK Crown servant
- I have not subscribed and will not subscribe to another JISA of this type for this child
- I am not aware that this child has another JISA of this type
- I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit
- I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded

I AUTHORISE THE BEVERLEY BUILDING SOCIETY

- to hold the child's subscriptions, JISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and to make on the child's behalf any claims to relief from tax in respect of JISA investments.
- I agree to the JISA terms and conditions and confirm that to the best of my belief the information of this form is true

Signature (1)..... Date

FOR OFFICE USE ONLY

Date opened	IDENTIFICATION
Cust. No	Tick non face to face <input type="checkbox"/>
A/C Type	Name..... Ref
Trf. in date	Address..... Ref
CHEQUE DETAILS	
A/C No.	Name..... Ref
Sort Code	Address..... Ref
Drawer	Existing BBS Member <input type="checkbox"/> Known Personally <input type="checkbox"/>
Branch/Agency.....	I confirm that the applicant named above is known personally to me
Input by.....	Signed
	A/C No
	Process date
	Checked by..... Date