



Please complete this form in **black ink** and **BLOCK CAPITALS** and sign the signature box in section 10.

1. TYPE OF ACCOUNT TO BE OPENED		
I/We enclose £ to open the following account	nt	
2. PERSONAL DETAILS		
First Applicant	Second Applicant	
Title	Title	
Forename(s)	Forename(s)	
Surname	Surname	
Date of birth	Date of birth	
Nationality	Nationality	
Permanent home address (inc postcode)	Permanent home address (inc postcode)	
Correspondence address (inc postcode)	Correspondence address (inc postcode)	
Daytime tel. no.	Daytime tel. no.	
Mobile no.	Mobile no.	
Email	Email	
Security identifier (for example mother's maiden name or place of birth)	Security identifier (for example mother's maiden name or place of birth)	
Occupation Details	Occupation Details	
Job title	Job title	
Self Certification for Tax Residency Status	Self Certification for Tax Residency Status	
Are you a citizen and tax resident of the UK only? Yes \( \text{No} \)	Are you a citizen and tax resident of the UK only? Yes No	
If ' <b>NO</b> ' you will be required to complete a separate self certification form.	If 'NO' you will be required to complete a separate self certification form.	

First Applicant	Second Applicant		
Senior Public Figure	Senior Public Figure		
Are you currently or have you ever been a senior public figure?  Yes No	Are you currently or have you ever been a senior public figure?  Yes No No		
*Senior public figure – occupying or have occupied a senior position in the government in any department, agency, subsidiary government organisation or political party.	*Senior public figure – occupying or have occupied a senior position in the government in any department, agency, subsidiary government organisation or political party.		
If <b>'YES</b> ' please state your position and dates in	If <b>'YES</b> ' please state your position and dates in		
position	position		
From To	From To		
Please name any senior public figure you are related to or have connections with and state the nature of the relationship	Please name any senior public figure you are related to or have connections with and state the nature of the relationship		
Deletionation	Deletionation		
Relationship	Relationship		
3. NOMINEE ACCOUNTS			
A nominee account is an account in which the named person(s) holding an account on behalf of a child.	ds funds on behalf of another (the beneficiary), e.g. a parent		
Is this a nominee account? Yes No Title of account			
(eg Mrs	Joan Smith Re James Smith)		
Beneficiary's details (owner of the funds)			
Name			
Permanent			
home address			
(inc postcode)			
Date of birth			
Self Certification for Tax Residency Status for the Beneficiary			
Are you a citizen and tax resident of the UK only? Yes No			
If 'NO' you will be required to complete a separate self certification form.			
<b>4. INTEREST INSTRUCTIONS</b> I/We require interest to be (please tick one of the following):			
A Added to this account			
B Paid to a Progressive account A/c no.			
C Paid to another bank/building society Bank/building society name			
Sortcode A/c no. A/c name			
Payment reference			
5. WITHDRAWAL INSTRUCTIONS			
Withdrawals may be made on the following number of signatures:			
Any one signature All signatures Any	signatures (please specify number of signatures required in box)		
It is important to note that the option allowing 'any one signature' r			

the account without the consent or knowledge of the other signatory(ies) at any time.

6. SOURCE OF FUNDS Please tick as appropriate:				
From another financial institution Savings	Inheritance Proceeds from land/house sale			
Other (please specify)				
7. EXPECTED METHOD TO BE USED TO FUND ACCOUNT				
Cash Cheque Debit card Electronic transfer Transfer from another Progressive account				
	mansier montanother mogressive account			
8. EXPECTED USE OF ACCOUNT	(1) (2)			
Regular saving Saving for specific purpose Othe	r (please specify)			
9. DECLARATIONS				
<ul> <li>I/We:</li> <li>certify that I am/we are the account holder(s), or I am/we are authorised to sign for the account holder(s) of the account to which this application form relates to;</li> </ul>	as proof of your identity. Further information on the agency searches and a list of acceptable documents for identification purposes can be found in the leaflet 'Proving Your Identity' which may be accessed at <b>theprogressive.com</b> .			
<ul> <li>declare that all statements made in this declaration are, to the best of my/our knowledge and belief, correct and complete;</li> </ul>	The Society will rely on the following legal basis for processing your personal data. The processing is necessary for:			
undertake to advise Progressive Building Society within 30 days of any change in circumstances which affects my/our tax	• the performance of a contract with you or to take steps to enter into a contract;			
residency status;	compliance with a legal obligation;			
• the person(s) whose signature(s) appears on this application form declare that the sums to be invested in this account will be	<ul> <li>the purposes of legitimate interests pursued by us or a third party.</li> </ul>			
held by me/us as either beneficial OR joint beneficial owners.	Account Declarations			
Marketing  The Society would like to send you information about products and services which it feels may be of interest to you by post, telephone, email and SMS. This may be through a third party acting on it's behalf. If you agree to being contacted in this way please tick the relevant boxes:	<ul> <li>By signing this application form you are confirming that you:</li> <li>have received the Summary Box for the account, which includes the account terms and conditions and the terms and conditions of the Savings General Terms and Conditions;</li> <li>have reviewed the Charitable Assignment as outlined in the</li> </ul>			
Post Telephone Email SMS	Savings General Terms and Conditions;  • have read the section 'Use of your information' and you agree to			
Applicant one	your information being used in this way;			
Applicant two	<ul> <li>have reviewed and agree to the use and disclosure of information as outlined under the Data Protection legislation section of the Savings General Terms and Conditions;</li> </ul>			
Use of your information	have received the Financial Services Compensation Scheme			
You will be required to prove your identity as the account holder, Nominee or Controller when opening a new account. The Society	<ul><li>information sheet;</li><li>agree to the use of your personal information to enable the</li></ul>			
will undertake a search with a credit reference agency or a data reference agency for this purpose. They will supply us with information, including information from the Electoral Register, for	Society to provide you with payment services, such as electronic payments, to and from your account. You may withdraw your consent by closing your account.			
the purpose of verifying your identity. A record of the search will be retained. The search will not be seen or used by lenders to assess your ability to obtain credit. This information may also be used for the prevention of money laundering. We use your data in line with our Privacy Policy/Terms and Conditions, which includes the potential consequences of third parties using your data. See our	This is the standard customer agreement upon which the Society intends to rely. For your own benefit and protection you should carefully read this information before signing this application form as these documents form the basis of the relationship between you and Progressive Building Society.			
website https://theprogressive.com/media/2686/privacy-notice-	If you do not understand any points please ask for further information.			
progressive-privacy.pdf for details.  If the Society cannot check your identity from the information you provide then it will require you to provide two items of documentation	A copy of the Society's Summary Financial Statement may be accessed at <b>theprogressive.com</b> .			
10. SIGNATURES				
All savers, including Nominees, must sign this application form account holders to operate the account.	. The Society may, at its discretion, require the signatures of all			
1st Applicant's signature	2 <sup>nd</sup> Applicant's signature			
Date Date	Date			

FOR BRANCH USE ONLY				
Account number Date opened				
If this is a postal application please tick				
	Customer number	Customer number		
	Saver 1	Saver 2		
Proceed with application	Y/N	Y/N		
Obtain valid ID	Y/N	Y/N		
Valid ID <u>already</u> held?				
Type of ID produced if not held				
Reference number/serial number				
ID issue date/expiry date				
Cashier's initials and date				
Branch/Agent				

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Progressive Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register Number 161841. All calls may be recorded and/or monitored. The Society is a member of the Building Societies Association. The Society has an internal complaints procedure. Complaints that cannot be resolved may be referred to the Financial Ombudsman Service, Exchange Tower, London E14 9SR (tel: 0800 023 4567 or 0300 123 9123) email: complaint.info@financial-ombudsman.org.uk. The Society is a subscriber to the Financial Services Compensation Scheme. Further details are available on request from the Society or by visiting our website: theprogressive.com or the Financial Services Compensation Scheme website: fscs.org.uk.

Unless otherwise stated, the law of Northern Ireland will apply and all communications and documentation in relation to this contract will be in English. You submit to the non-exclusive jurisdiction of the Northern Irish Courts.