



# SAVINGS APPLICATION FORM

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

## 2. PERSONAL DETAILS

### First Applicant

Title

Forename(s)

Surname

Date of birth

Nationality

Permanent home address (inc postcode)

Correspondence address (inc postcode)

Daytime tel. no.

Mobile no.

Email

Security identifier (for example mother's maiden name or place of birth)

### Second Applicant

Title

Forename(s)

Surname

Date of birth

Nationality

Permanent home address (inc postcode)

Correspondence address (inc postcode)

Daytime tel. no.

Mobile no.

Email

Security identifier (for example mother's maiden name or place of birth)

### Occupation Details

Job title

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Job title

### Self Certification for Tax Residency Status

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.

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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.

**First Applicant****Senior Public Figure**

Are you currently or have you ever been a senior public figure?

Yes  No

*\*Senior public figure – occupying or have occupied a senior position in the government in any department, agency, subsidiary government organisation or political party.*

If **'YES'** please state your position and dates in

position

From  To

Please name any senior public figure you are related to or have connections with and state the nature of the relationship

Relationship

**Second Applicant****Senior Public Figure**

Are you currently or have you ever been a senior public figure?

Yes  No

*\*Senior public figure – occupying or have occupied a senior position in the government in any department, agency, subsidiary government organisation or political party.*

If **'YES'** please state your position and dates in

position

From  To

Please name any senior public figure you are related to or have connections with and state the nature of the relationship

Relationship

**3. NOMINEE ACCOUNTS**

A nominee account is an account in which the named person(s) holds funds on behalf of another (the beneficiary), e.g. a parent holding an account on behalf of a child.

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.

**4. INTEREST INSTRUCTIONS**

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' means that any one signature can withdraw funds, amend or close the account without the consent or knowledge of the other signatory(ies) at any time.



**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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**Head Office, Progressive House, 33/37 Wellington Place,  
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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.

**Branches & Agents across Northern Ireland**

**[theprogressive.com](http://theprogressive.com)**

Savings 18/01/2025