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SUBSEQUENT BUSINESS SAVINGS ACCOUNT FORM FOR SOLICITORS

If you are a solicitor business and have an existing Online Business Account, please complete this shortened form for a subsequent account to be created.

BUSINESS INFORMATION

1. PLEASE PROVIDE THE NAME OF YOUR REGISTERED BUSINESS ACCOUNT

2. PLEASE PROVIDE THE NAME OF THE AUTHORISED INDIVIDUAL

3. PLEASE PROVIDE THE BUSINESS EMAIL ADDRESS OF THE AUTHORISED INDIVIDUAL

4. PLEASE PROVIDE THE BUSINESS MOBILE NUMBER OF THE AUTHORISED INDIVIDUAL



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NEW ACCOUNT INFORMATION

5. WHICH PRODUCT DO YOU WANT TO SELECT?

(E.g. One-year bond/Two-year bond/Instant Access)

6. PLEASE TELL US HOW MUCH THE BUSINESS WILL DEPOSIT WHEN OPENING THE ACCOUNT

(Provide a £ value)

7. PLEASE LET US KNOW WHAT NAME YOU WISH THE NEW ACCOUNT TO BE IN, IF DIFFERENT FROM ABOVE

(E.g. "XXX solicitors client account re: A.N. Other" OR "XXX Credit Union Senior Account" – Max 45 Characters)



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SOURCE OF FUNDS

8. ARE YOU SAVING £10,000 OR MORE?

YES ☐ NO ☐

9. PLEASE CONFIRM THE SOURCE OF FUNDS

CLIENT SHAREHOLDING FUNDS	☐	SALE OF ASSET	☐
TRADING INCOME	☐	OTHER	☐

Please specify other

10. HOW OFTEN DO YOU EXPECT TO USE THE ACCOUNT?

ONE OFF LUMP SUM	☐	DAILY	☐	WEEKLY	☐
MONTHLY	☐	QUARTERLY	☐	HALF-YEARLY	☐
ANNUALLY	☐				

11. PLEASE SELECT THE OPTION WHICH MOST ACCURATELY REFLECTS THE ANTICIPATED TURNOVER OF THE DEPOSIT ACCOUNT, EXCLUDING YOUR INITIAL DEPOSIT, DURING A TYPICAL YEAR.

LESS THAN £20,000	☐	£20,001 - £50,000	☐
£50,0001 - £100,000	☐	£100,001 - £250,000	☐
OVER £250,000	☐		



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DECLARATION

Before submitting this application, you must read the following important documents which can be found in the Savings Section of the Document Hub at [Progressive Building Society - Document Hub - Progressive Building Society](#). If you require a hard copy of any of these documents, please contact us on 0800 0294 997.

- Business Savings General Terms & Conditions
- FSCS information leaflet
- Tariff of Charges
- Privacy Policy
- Internal Complaints Procedures

For your own benefit and protection carefully read these documents before submitting this application as these documents form the basis of the relationship between you acting as Authorised Individual for the business and Progressive Building Society. If any of the points are unclear, please ask for further information.

A copy of the Society's Summary Financial Statement may be accessed at www.theprogressive.com



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Account Declarations:

By completing and submitting this application, you are confirming that you:

- Have reviewed the summary box and agree to the terms and conditions of the account the business is applying for.
- Have reviewed and agree to the Business Savings General Terms & Conditions.
- Have reviewed and agreed to the use of your business's information outlined in the Society's Privacy Policy.
- Are authorised to act on behalf of the business as Authorised Individual of the account.
- You understand only the Authorised Individual can operate the account, however the Society reserves the rights to contact any other individual named on this account to ensure the Society complies with all regulatory requirements, including fraud prevention.
- The information provided is true, accurate and complete.
- You will notify the Society within 14 days of changes to directors, partners, business owners or the Authorised Individual.
- You will notify the Society within 30 days of changes to tax residency to directors, partners, business owners or the Authorised Individual. Information may be shared with HMRC and tax authorities where required.
- You accept that the Society may decline the business savings account application.

You are confirming the information in relation to business owners, directors, partners and the authorised individual which you submitted with your first online account application remains accurate and current for the purpose of opening this business account. If any of the information is no longer accurate, or you need to tell us about any other changes, you must complete a Business Savings Amendment Form available under the Savings section of the document hub on our website www.theprogressive.com/document-hub and submit the form via the Contact Us form on our website: www.theprogressive.com/contact-us selecting "Business Accounts" as your query option from the dropdown menu. If you require a copy of your first online account application form, please contact us on 0800 0294 997.

DATE