

THE CHARITY BANK CASH ISA - Second Issue

PERSONAL ACCOUNT APPLICATION FORM

PLEASE USE BLOCK CAPITALS

This form is for an application for a Cash ISA for the tax year 2010/2011 and each subsequent year until further notice.

Please complete and return this form to:
Charity Bank, 194 High Street, Tonbridge, Kent TN9 1BE



FOR OFFICE USE

Account number

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1 Charity Bank Cash ISA

I would like to open the account with £ (minimum £250)

Transfer In request

Please enclose cheque payable to **Charity Bank and your name**

2 Personal details

Mr/Mrs/Ms/other

Full name

Permanent residential address

Post code

How long at that address?

If less than three years, supply previous address separately

Telephone number (home) Mobile

Email address

Date of birth / /

Country and place of birth

National Insurance number

Where did you hear about Charity Bank?

3 Cash ISA Transfer In Request (for funds invested in a Cash ISA with another Cash ISA Manager)

The details of the Cash ISA Manager (institution) where you have a Cash ISA from which you wish some or all of your subscriptions to be transferred to The Charity Bank Limited. You need to complete a separate form for each account being transferred.

Cash ISA Manager

Cash ISA Account Number

Address

Post code

Amount to transfer to Charity Bank £

Full Balance

4 Use of information

Interest will be added to your account on the last day of December each year.

Charity Bank will use your information to provide the charitable products or service you have requested. We will not disclose your information to any outside organisation except as part of providing that product or service or when legally advised to do so.

We may provide you with details or information about products, services or events of ours which we think may be of interest to you. If you do not wish to receive such information or details of our other products, services or events please indicate here

5 Declaration

Each signatory should read the following before signing

I have read the account terms and conditions set out in the Deposit Account Terms and Conditions and agree to be bound by them.

I agree to Charity Bank using the information contained in this form for processing the application and managing the account, including carrying out an electronic search. I understand that the information may be held electronically and also that it may be retained after the account is closed. I am aware that under the Data Protection Act 1998 I can request a copy of any personal information held about me in the Bank's records and also ask for any errors to be corrected.

6 Cash ISA application

I apply to subscribe for a cash ISA for the tax year 2010/2011 and each subsequent year until further notice

I declare that

- all subscriptions made, and to be made, belong to me;
- I am 16 years of age or over;
- I have not subscribed and will not subscribe more than £10,200 in total into a Cash ISA and Stocks and Shares ISA in the same year;
- I have not subscribed and will not subscribe more than £5,100 of the overall £10,200 total into a cash ISA;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA; and
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform The Charity Bank Limited if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I authorise The Charity Bank Limited

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash
- to make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.

I declare that this application form has been completed to the best of my knowledge and belief.

Signature

Date / /