

Newcastle Monthly Saver Account Application Form

Index Code POCPBK

For Office use only:

New Account Number Passbook Reference

WHAT ARE YOUR PERSONAL DETAILS?

1ST ACCOUNT HOLDER

Mr/Mrs/Miss/Ms/Other Forename(s) Surname

Date of Birth Nationality* Sex (male/female)

Permanent Residential Address

Postcode Home Telephone Work Telephone

E-mail Current Employer

Do you require an R85 form (declaration for the payment of interest without deduction of tax)? Yes No

Do you already hold an account with Newcastle Building Society? Yes No If yes, please provide the Account No.

2ND ACCOUNT HOLDER

Mr/Mrs/Miss/Ms/Other Forename(s) Surname

Date of Birth Nationality* Sex (male/female)

Permanent Residential Address

Postcode Home Telephone Work Telephone

E-mail Current Employer

Do you require an R85 form (declaration for the payment of interest without deduction of tax)? Yes No

Do you already hold an account with Newcastle Building Society? Yes No If yes, please provide the Account No.

*This is requested for regulatory reasons.

HOW MUCH ARE YOU INVESTING?

Your Initial Investment £ (min. £10, max. £1,000,000)

If you wish to make your initial investment direct from an existing Newcastle Building Society account, please remember to enclose your passbook with your application.

For security reasons the cheque must be payable to Newcastle Building Society Re: Your Name, Account/Application Number (if known). In addition please remember to draw a line through any unused space on the cheque.

PROOF OF IDENTITY AND RESIDENCY

To comply with anti-money laundering regulations, all customers who enter into a business relationship with the Society must prove their identity and residency. The preferred method is via an electronic authentication system. This will match personal details against a range of publicly available records and credit records. Details of credit histories will not be made available to us and, although the data provider may log the search, it will not be used for future credit assessment purposes.

There are a many reasons why a match may not be obtained, for example if you have recently moved house, have little or no credit etc. In these situations, documentary evidence may need to be requested. To enhance the chances of a positive match, a photocopy of your passport or driving licence should be enclosed, and the information provided below:

Passport Number Driving Licence Number

DECLARATION

I/We declare that the information I/we have provided on this application form is correct to the best part of my knowledge and belief.

If your account is a joint account, these conditions and any special conditions apply to all of you together and any of you separately. In the event of the death of any customer the account will remain open in the name(s) of the remaining customer(s). In the event of divorce or separation the Newcastle (providing it is made aware of the situation in writing) will not permit withdrawals (i.e. following maturity) to be made from the account unless signed instructions from both account holders are received.

I/We authorise withdrawals and transfers (where applicable) to be made against:

Any one of the signatures All signatures

I/We confirm that I/we acknowledge receipt of information containing the terms and conditions of the account, and agree to be bound by the rules of the Newcastle in force at the time.

I/We understand that Newcastle Building Society is not liable for any loss suffered by the Account Holder(s) arising from fraudulent use of the account.

The Newcastle will assume that any Account nominated for payment of interest will also be used as the nominated account for withdrawals unless we receive specific written instructions stating otherwise.

HOW DID YOU HEAR ABOUT THIS PRODUCT?

Branch Display Newspaper Friend / Relative The Newcastle's Staff
Financial Advisor The Newcastle's Website Another website Letter from Us
Other

PRIORITY REGISTER SERVICE

You can join our Priority Register to be amongst the first to find out by letter, telephone or email, about new products, services and offers from Newcastle Building Society Group and its commercial partners. This enables you to act quickly and take advantage, as many of our products are strictly limited and can be withdrawn early if demand is high. You may miss out on these special offers if you do not sign up for the Priority Register.

Note: if you join our Priority Register this will supersede any contact preferences indicated in the "Use of your personal information" section below or already held on our system.

Please tick here if you and any joint applicants/ holders would like to be added to our Priority Register.



USE OF YOUR PERSONAL INFORMATION

Newcastle Building Society will hold information about your account(s) for business analysis, fraud prevention and to keep your records accurate and up to date. We, and other companies in our group with the Newcastle name ("the Newcastle Building Society Group") may also use your contact and personal details from your accounts and records within the Group to identify products and services, which may be of interest to you. We may contact you by letter, telephone or email to inform you about products and services, including those of our commercial partners whose products and services can be purchased through us. This may include information about our/their mortgage savings, investment, and pensions products, general insurance products, financial planning and services such as credit cards, loans, and mortgage broking services. Further details about companies in the Newcastle Building Society Group and our commercial partners can be found on our website at www.newcastle.co.uk. By returning this form, you agree that we may contact you, and any joint applicants/ holders, in the above ways, unless you tick the box(es) below:

I do not wish Newcastle Building Society Group companies to contact me by the following methods regarding its products and services:

Letter Telephone E-mail

I do not wish Newcastle Building Society Group companies to contact me about products and services of its commercial partners

Under the Data Protection Act I/we can ask to see a copy of the personal information Newcastle Building Society holds on me/us by writing to the Legal Services Department, Newcastle Building Society, Portland House, New Bridge Street, Newcastle upon Tyne, NE1 8AL. I/We understand that this will involve payment of a fee.

(Please note that if you are an existing account holder with Newcastle Building Society then the preference you indicate here will supersede any existing preference you may have nominated when opening your previous account(s). If a second holder wishes to nominate exemptions that are different to those expressed above then that individual should write to The Legal Services Department indicating their preferences).

CHARITABLE FOUNDATION

The Newcastle Building Society wants to avoid disruption to its business caused by speculators. As a result all new customers opening share accounts are required to assign any windfall benefits to which they might become entitled on a future conversion or take-over of the Newcastle. The assignment will be in favour of the Community Foundation serving Tyne & Wear and Northumberland, one of the leading community foundations in the UK. The agreement will be for a period of 5 years (please see 'Agreement to assign windfalls to charity' for further details).

YOUR RIGHT TO CANCEL

I/We understand that I/we have the right to cancel this contract, without incurring any additional costs, within 14 calendar days (excluding public holidays) of the receipt by Newcastle Building Society of my application to open this account. If I/we decide to exercise this right, which must be made in writing to the address shown on this leaflet, the Newcastle will send a cheque to me to cover my original investment, plus any interest earned during this period. Interest will be paid at prevailing Nova Plus rates, subject to the deduction of the lower rate of tax (currently 20%). This right can be exercised regardless of the notice period applicable to the account.

YOUR SIGNATURE(S)

I acknowledge receipt of the product information containing the terms and conditions of the account and agree to be bound by them.

1st Account Holder's Signature Date

2nd Account Holder's Signature Date

APPLICATION CHECKLIST

Please ensure the following are included with your completed application form.

1. Your account passbook and/or a personal cheque made payable to Newcastle Building Society Re: Your name(s) Check

2. Proof of identity and residency (see overleaf for further details) Check

Once your account has been opened we will write to you with your passbook and confirm the amount invested in the account.

Please note, failure to complete the application in full may invalidate the application.

Return your completed application form - with your cheque (made payable to the account holder) and the required proofs of residency/identity to your local branch or to the following freepost address: **Newcastle Building Society, FREEPOST NT330, Portland House, New Bridge Street, Newcastle upon Tyne, NE1 1BR (No stamp is required).** If you need any help or have any queries please call in to your local branch or contact the Newcastle on 0845 606 5522.