



General Investment Application Form

FOR OFFICE USE ONLY

Account number:

Branch:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Please complete this form in black ink. Complete sections 1 to 4 using **BLOCK CAPITALS** and sign the signature box in section 5.

1 Initial investment

You must specify the Account you wish to invest in before proceeding any further. All investors should fill in their details. If your application has more than 2 investors, please complete an additional application form (indicating that this is for the 3rd and 4th applicants) and attach with this application.

I/We enclose

£

to be invested in (product name and issue number)

current interest rate

%

Amount by transfer

£

transferred from Account number (please enclose passbook)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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2 Personal details

Please note, if this application is being made to include an Attorney then a Power of Attorney Application will also be needed. Please contact us for the relevant form.

1st Applicant

Are you an existing customer? No Yes

Account number

Title Mr Mrs Miss Ms Other

Forename(s) in full

Surname

Date of Birth

Occupation

Nationality

Country of Birth

Permanent Residential Address
Postcode

Home Tel

Daytime Tel

Mobile Tel

Email

2nd Applicant

Are you an existing customer? No Yes

Account number

Title Mr Mrs Miss Ms Other

Forename(s) in full

Surname

Date of Birth

Occupation

Nationality

Country of Birth

Permanent Residential Address
Postcode

Home Tel

Daytime Tel

Mobile Tel

Email

3 Tax liabilities

1st Applicant

1. Are you resident for tax purposes anywhere other than the UK? No Yes

If 'yes' please list below all the countries in which you are tax resident and provide your relevant tax reference or taxpayer identification number (or functional equivalent):

Country(ies) in which you are tax resident	Relevant Tax Reference Number or Tax Identification Number
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

If you have more than two tax liabilities please provide the additional information on a separate sheet of paper.

2. Are you a citizen of the United States of America? No Yes

If 'yes' please provide your USA Tax Identification Number (TIN):

If you are unsure as to your tax liabilities you should seek independent advice before completing and signing this form.

2nd Applicant

1. Are you resident for tax purposes anywhere other than the UK? No Yes

If 'yes' please list below all the countries in which you are tax resident and provide your relevant tax reference or taxpayer identification number (or functional equivalent):

Country(ies) in which you are tax resident	Relevant Tax Reference Number or Tax Identification Number
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

If you have more than two tax liabilities please provide the additional information on a separate sheet of paper.

2. Are you a citizen of the United States of America? No Yes

If 'yes' please provide your USA Tax Identification Number (TIN):

If you are unsure as to your tax liabilities you should seek independent advice before completing and signing this form.



Financial Services Compensation Scheme

Information Sheet

The Financial Services Compensation Scheme ('FSCS') protects deposits made by most individuals and businesses. Your account statement will confirm whether your deposits with Leeds Building Society are eligible for FSCS protection. Details of certain exclusions from the FSCS's protection are set out in the exclusions list after this information sheet.

Limit of protection

£120,000 per depositor per bank, building society or credit union.

If Leeds Building Society goes out of business the eligible deposits with Leeds Building Society will be added up and the £120,000 will be applied to the total balance. For example, if you hold a savings account with £80,000 and a current account with £50,000, FSCS will pay you £120,000 and you may lose £10,000.

To ensure the FSCS can pay you promptly please ensure that Leeds Building Society has your up-to-date contact details including your email address.

Joint and group accounts

Each eligible account holder is entitled to £120,000 protection in total. For example, if there are two account holders, you will each be entitled to £120,000 protection, giving a total of £240,000.

Eligible deposits in business accounts are treated as if made by a single depositor. This means these types of account will only be protected up to £120,000.

Temporary high balances

If you have a 'temporary high balance' you may be entitled to more than £120,000 protection for six months from when the amount was first deposited or legally transferred. Temporary high balances are deposits connected with certain events, including:

- (a) Transactions relating to the purchase and sale of your main home.
- (b) Major life events such as death, your marriage or civil partnership, divorce, retirement, redundancy, disability or incapacity.
- (c) Compensation for personal injuries or wrongful conviction.

How the FSCS will pay you

FSCS will typically return deposits within seven business days by cheque or electronic payment into an alternative account. Payments may take longer in exceptional circumstances, for example if there is a temporary high balance, or the deposit is held on behalf of underlying beneficiaries.

Contact details for further questions about your account	Leeds Building Society 26 Sovereign Street, Leeds, LS1 4BJ. Telephone: 03450 50 50 75
Contact details for more information on FSCS protection	You can find more information on FSCS protection on its website at www.fscs.org.uk or by contacting the FSCS using the details below: Telephone: 0800 678 1100 Email: enquiries@FSCS.org.uk

Exclusions List

As set out in the Depositor Protection Information Sheet, deposits held by individuals and businesses will be generally eligible for FSCS protection up to the compensation limit. However, some exclusions do apply. Details of the most common exclusions are set out below. For full details of the exclusions please see the Depositor Protection Part of the PRA Rulebook.

A deposit is excluded from protection if it meets any of the following criteria:

- (1) The account holder is:
 - a credit institution
 - a financial institution
 - an investment firm
 - an insurance undertaking
 - a reinsurance undertaking
 - a collective investment undertaking
 - a pension or retirement fund
 - a public authority, other than a small local authority.

Note that:

- (a) Deposits held on behalf of underlying beneficiaries who are eligible for FSCS protection, are not excluded.
- (b) Personal pension schemes, stakeholder pension schemes or occupational pension schemes for micro, small and medium sized companies are not excluded.

- (2) It is not held at a UK establishment of a bank, building society or credit union. Or, in the case of a bank, building society or credit union incorporated in the UK, it is not held at an establishment in Gibraltar.
- (3) The deposit is involved in any transactions where there is a link to a criminal conviction for money laundering. For example, it is transferred from an account held by someone who has been convicted of money laundering.