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# Cash ISA

## Application Form

Please complete this form in black ink. Complete sections **1 to 3** using **BLOCK CAPITALS** and sign the signature box overleaf.

### 1 Tax Year 2025/2026

Are you an existing customer?  Yes  No If **yes**, enter your existing account number:

Enter the name of the cash ISA you wish to apply for  cash ISA

With an initial investment of  £ (Please provide further details of your investment below)

Amount of cheque enclosed  £ Amount by transfer from a non-ISA  £

Transferred from Account number (please enclose passbook)

### 2 Your 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.

Title  Mr  Mrs  Miss  Ms  Other

Forename(s) in full

Surname

Date of Birth

Permanent Residential Address

Postcode

Occupation

Nationality

Country of Birth

Home Tel

Daytime Tel

Mobile Tel

Email

Do you have a National Insurance (NI) Number?  Yes  No If **'yes'** please enter NI number here

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP or pension order book.

I apply to subscribe for a cash ISA for tax year 2025/2026 and each successive year until further notice.

### 3 Interest Instructions

Please add interest to (please tick/complete one of the following).

A.  Add to this account

B.  Transferred into the following bank/building society account

Name(s)  Bank/Building Society Name

Reference  Account number  Sort code

C.  Paid into another Leeds Building Society account

Name(s)  Account number

**YOUR INTEREST...IN THEIRS:** The Society can deduct the pence amount of your annual net interest (never more than 99p a year) and donate this to the Leeds Building Society Charitable Foundation and partner charities. Find out more by visiting [www.leedsbuildingsociety.co.uk/yjit](http://www.leedsbuildingsociety.co.uk/yjit). If you wish to donate your pence interest, please tick this box

## Charitable Assignment

Further information about Charitable Assignment can be found at [www.leedsbuildingsociety.co.uk/your-society/about-us/charitable-assignments](http://www.leedsbuildingsociety.co.uk/your-society/about-us/charitable-assignments)

Words printed in bold in this section are explained in paragraph 5 below. If you were a **member** of the **Society** on 28 February 1999 and have continued to be a **member** ever since that date, the following wording does not apply to you; in that case, please go to the Use of Personal Information section. All other applicants should read on:

- By applying to open an account I agree with the **Society** and the **Charity** that I will transfer to the **Charity** the right to any **Windfall**.
- This will not apply to me if I fall within any class of persons which as at today's date the **Society** wishes to be excluded from this obligation.
- To ensure that the agreement I have entered into in paragraph 1 can be effectively carried out:
  - I authorise the **Society** to transfer any **Windfall** direct to the **Charity**;
  - I agree to sign any documents and to do anything else which may be needed to transfer any **Windfall** and any right to receive the **Windfall** to the **Charity**;
  - I appoint the **Society** and any of its officers and (as a separate appointment) the **Charity** and any of its officers to be my agent to take any of the steps mentioned in (b) above on my behalf;
  - I authorise the **Society** to provide the **Charity** with any information it reasonably requires about me and any accounts I hold with the **Society**, and I consent to the **Society** and the **Charity** holding and processing such information for this purpose; and
  - I agree that I cannot revoke the authority contained in (a), (b) or (d) above, or the appointment contained in (c) above.
- I also understand that the **Society** will require (on behalf of itself and the **Charity**) that all applicants for share accounts who are not **members** of the **Society** will agree to the condition in paragraph 1 (or a condition having substantially the same effect) other than in respect of applicants falling within any class of persons where, at the time of the applicants becoming shareholding members, the **Society** considers this to be inappropriate. The **Society** will not impose the requirement in paragraph 1 on applicants if the **Society** decides and announces by press release that it is no longer in the best interests of the **Society** to do so generally on a continuing basis. Any such decision by the **Society** would not have retrospective effect and I would continue to be bound by the condition in paragraph 1.
- In this section:
  - Leeds Building Society Charitable Foundation is registered at Companies House with company number 03724612 and is a registered charity number 1074429. The "**Charity**" is Leeds Building Society Charitable Foundation or, if it ceases to exist, any other charity which becomes entitled to the benefit of the agreement I have entered into in paragraph 1;
  - "**member**" means a shareholding member or a borrowing member of the Society;
  - the "**Society**" means Leeds Building Society and if the **Society** merges with any other society, after the date of that merger, the "**Society**" includes that other society;
  - "**Windfall**" means any benefits which I might become entitled to receive:
    - as a shareholding member or depositor with the **Society** at any time within five years immediately following the date on which my account is opened (or within any shorter period as the **Society** today considers appropriate having regard for any particular category of person within which I may fall);
    - under the terms of any future transfer of the **Society's** business to a company (i.e. on a conversion or takeover of the **Society**) except the statutory right to have shares in the **Society** (including any balances on share accounts) converted into deposits with the company.

## Use of Personal Information

Your personal information is held by Leeds Building Society and may be used in a number of ways, for example:

- to verify your identity;
- for fraud prevention;
- to manage your account;
- for audit and debt collection purposes;
- for statistical analysis.

We may also share your information with, and obtain information about you from, Credit Reference Agencies, Fraud Prevention Agencies and other third parties. For information regarding how Credit Reference Agencies and Fraud Prevention Agencies will use your personal information, please visit our website, contact your local branch or call us on 03450 50 50 75\* to obtain the relevant leaflets or to find out more.

You have a number of rights on how your information is used, how we maintain the security of your information and your rights to access information we hold about you. Please read our [Customer Privacy Policy](#) for full details of how we will obtain, use and store your information.

### ISA Declarations

#### I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed/made payments, and will not subscribe/make payments more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA, and a Lifetime ISA in the same tax year;
- I have not subscribed, and will not subscribe to another cash ISA with Leeds Building Society in the same tax year that I subscribe to this cash ISA;
- I am 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 Leeds Building Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties; and
- I agree to the ISA terms and conditions.

#### I authorise Leeds Building Society

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

### Account Declarations

#### I declare that:

- This application has been completed to the best of my knowledge and belief and that the information provided is true and accurate. I agree to notify the Society of any changes to the information provided.

#### I acknowledge that I have received, a copy of:

- the Product Terms and Conditions and the General Conditions (which includes the Summary Financial Statement) and agree to be bound by these including the Society's Rules;
- the Financial Services Compensation Scheme Information sheet and Exclusions List; and
- the Customer Privacy Policy and agree to my personal information being used in accordance with it.

\*We may monitor and/or record your telephone conversations with the Society to ensure consistent service levels and for colleague training purposes.

## Your Authority

**You must read this form carefully and sign below. Failure to do so may delay the processing of this application.**

By signing below, I confirm that I agree to be bound by the sections above, titled:

- Charitable Assignment" (where this applies);
- Use of Personal Information
- ISA Declarations; and
- Account Declarations

**For your own benefit and protection you must read all documents carefully. If you do not understand something, please call us on 03450 50 50 75\* or visit your local branch for clarification before you proceed.**

Signature

Date: DD / MM / YYYY



# 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.

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

## 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.