

# Application to add a Third Party Mandate

This form can be completed electronically then saved and printed. If completing manually, please complete in black ink and BLOCK CAPITALS. If you need any help completing this form, please call us on 01257 235003 or visit your local branch.

## 1. Personal Details

### Existing Account holder 1 details

Surname

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Forename(s) in full

Home telephone

Mobile Number

Email address

Permanent Residential Address

Postcode

Date of birth

### 2nd Account Holder (Only to be completed for joint accounts)

Surname

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Forename(s) in full

Home telephone

Mobile Number

Email address

Permanent Residential Address

Postcode

Date of birth

## 2. Keeping You Up To Date About Our Products and Services

From time-to-time Chorley Building Society would like to provide you with information on our products and services, offers and promotions which we believe may be of interest to you. Please tick the boxes to tell us all the ways you would prefer to hear from us:

Existing Account Holder 1 Email ☐ Text Message ☐ Phone ☐ Post ☐ I do not wish to receive any marketing communications ☐

Existing Account Holder 2 Email ☐ Text Message ☐ Phone ☐ Post ☐ I do not wish to receive any marketing communications ☐

You can opt out of marketing or change your preferences at any time by following the instructions in each communication. For more information, please refer to our privacy policy.

## 3. Current employment status

### Existing Account Holder 1

☐ Employed ☐ Self employed ☐ Retired ☐ Student ☐ Homemaker ☐ Unemployed ☐ Other

Occupation

Annual Income ☐ £0 - £24,999 ☐ £25,000 - £49,999 ☐ £50,000 - £74,999

☐ £75,000 - £149,999 ☐ £150,000 - £299,999 ☐ £300,000 +

### Existing Account Holder 2

☐ Employed ☐ Self employed ☐ Retired ☐ Student ☐ Homemaker ☐ Unemployed ☐ Other

Occupation

Annual Income ☐ £0 - £24,999 ☐ £25,000 - £49,999 ☐ £50,000 - £74,999

☐ £75,000 - £149,999 ☐ £150,000 - £299,999 ☐ £300,000 +

## 4a. What type of third party are you applying for?

☐ Savers Account Operator ☐ Young Savers Account Operator ☐ CTF / JISA Registered Contact

Refer to the Third Party Mandate Explained document which can be found on our website or requested in branch.

# Application to add a Third Party Mandate

## Accounts to which third party is to be added

Account Name

Account Number

Account Name

Second account number (if applicable)

Account Name

Third account number (if applicable)

Account Name

Fourth account number (if applicable)

## 4b. Third Party details

Title

☐

Mr

☐

Mrs

☐

Miss

☐

Ms

Address

Other

Forename/s in full

Surname

Date of birth

Relationship to account holder

Postcode

Signature of third party

Telephone

Email address

Date

The proposed Third Party Mandate holder should return this form to Chorley Building Society together with the required forms of identification. Please refer to the Society's Identification Criteria which is available in branch or at [www.chorleybs.co.uk](http://www.chorleybs.co.uk)

I/We hereby authorise and request Chorley Building Society to permit the person detailed in section 4B of this form to operate my/ our accounts (as listed above). I/We understand that a person with a Third Party Mandate has the authorisation to be given information regarding the account(s) I/We further understand that the Third Party Mandate holder's signature shall be a complete and binding discharge and I/we agree that this authority shall remain in force until receipt of your acknowledgement of any notice of revocation given by me/us.

## Account holders to sign:

Account Holder 1

Account Holder 2

Date

Date

## Your Personal Information and what we do with it

Chorley and District Building Society is the Data Controller of any personal data you supply. The information you provide, we obtain through our dealings with you or about your account will be held on the Society's computers and in other records. We may use and share your personal information to help us provide the services you are applying for and to conduct an electronic search on you via the services of external agencies in order to confirm your identity and comply with money laundering regulations. Under relevant data protection laws, you have a number of rights including the right to see and receive a copy of information held about you on our records and to ask for any inaccurate details to be corrected. For more details of how we will use and share your personal information, and about your rights, please read our Privacy Notice on our website at [www.chorleybs.co.uk/privacy](http://www.chorleybs.co.uk/privacy)

If you have any questions about the relevant data protection laws or your rights under them, please write to the Data Protection Officer, Chorley Building Society, Key House, Foxhole Road, Chorley, Lancashire PR7 1NZ or by email to [DPO@chorleybs.co.uk](mailto:DPO@chorleybs.co.uk)

## STAFF USE ONLY

Customer Advisor

Customer Number of Account Holder

Customer Number of third party

Scanned to N Drive

☐

Yes

☐

No

QA check completed by

Head Office address: Key House, Foxhole Road, Chorley, PR7 1NZ | 01257 235003 | [chorley@chorleybs.co.uk](mailto:chorley@chorleybs.co.uk) | [www.chorleybs.co.uk](http://www.chorleybs.co.uk)

Chorley Building Society is the trading name of The Chorley and District Building Society. The Chorley and District Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority with the Firm Reference Number: 2062023.

You can check this on the Financial Services Register at <http://register.fca.org.uk>. Our registered Office is at Key House, Foxhole Road, Chorley, PR7 1NZ.