



Accelerated Growth Bond – cash ISA Transfer application

PERSONAL DETAILS AND PERMANENT RESIDENTIAL ADDRESS

Please complete all the boxes. Provided the product applied for is available on receipt of the transfer, please take this as an acceptance of transfer to West Bromwich Building Society of cash ISA or previous years cash ISA subscription

Full Name	<input type="text" value="Mr/Mrs/Miss/Ms (delete as appropriate)"/>		
Address	<input type="text"/>	Date of Birth	<input type="text"/>
		Tel No. (home)	<input type="text"/>
Postcode	<input type="text"/>	(work)	<input type="text"/>
Nationality	<input type="text"/>	(Moblie)	<input type="text"/>
National Insurance Number	<input type="text"/>	Email	<input type="text"/>

I apply to transfer my existing cash ISA to an Accelerated Growth Bond – ISA (minimum £2,000 maximum annual entitlement of £3,600 or any amount (subject to £2,000 minimum) from previous year(s) subscriptions.

From	<input type="text"/>	A/c No.	<input type="text"/>
Bank / Building Society		to	<input type="text" value="West Bromwich Building Society"/>

Please arrange to transfer the following amount:

a) The entire ISA Approximate balance £ b) Part of ISA Amount to be Transferred £

(and subscribe to this cash ISA for the tax year 20 / and each subsequent year until further notice.)

Delete the words in brackets if you will not be subscribing to this ISA.

I enclose my cheque for £ (max £3,600)

(Please make cheques payable to the applicant. Please print your name and address on the reverse of the cheque.)

DECLARATION

I declare that:

- I am 16 years of age or over;
- I have not subscribed and will not subscribe more than £7,200 in total to a cash ISA and a stocks and shares ISA in the same tax year;
- I have not subscribed and will not subscribe more than £3,600 of the overall £7,200 total to a cash ISA;
- I have read, understood and agree to be bound by the 'terms and conditions' relating to the selected cash ISA account for which I am applying.
- I agree to be bound by the Society's Rules (a copy of which is available on request) and the 'terms and conditions' of the selected cash ISA.

points 6-8 are only applicable if you are also subscribing to this tax year:

- All subscriptions made, and to be made, belong to me;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA;
- 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 West Bromwich Building Society 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 West Bromwich 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;
- to make on my behalf any claims to relief from tax in respect of ISA investments; and

The information obtained regarding your application may be held by the Society, its successors and assigns. The Society, its successors in title and assigns may use your information for statistical analysis, for administering your account. The Data Controller is West Bromwich Building Society.

It is important you read and understand this information. By signing this application, you agree that we can use your information in this way.

Please note that the Accelerated Growth Bond is a medium-term investment and no withdrawals can be made during the term (except for a cash ISA). Also, no statements will be sent – other than the initial statement confirming the amount invested following the offer period – until maturity. Investment growth depends on the performance of the FTSE-100 Index, but you are guaranteed the return of your capital investment in any case (less withdrawals from a cash ISA). Payment will be made by BACS on 19 June 2013.

MATURITY PAYMENT

Shortly prior to the maturity of the Accelerated Growth Bond, you will be sent a letter to let you know about your re-investment opportunities, and requesting bank details for repayment of your maturing funds and the interest applicable, where you decide not to reinvest.

AUTOMATIC REINVESTMENT ON MATURITY

Prior to the Maturity Date, you will be advised in writing of other investment products that can be used for re-investment of the account. Where you request your maturing funds to be returned to you, you will be asked for bank details, so that the payment can be made by BACS. In the absence of any instructions from you prior to the Maturity Date, the Bond will automatically be paid into a fixed rate product if available. Alternatively, if not available into a variable rate attracting the same rate as the top band as the Society's Premium Share Account - or, in the case of the cash ISA option will be placed in a variable rate West Brom cash ISA, if available. Current rates can be obtained at www.westbrom.co.uk.

DATA PROTECTION

The information obtained regarding your application and subsequent investment may be held by the Society, its successors in title and assigns. The Society, its successors and assigns may use this information for statistical analysis, for administering your account, and for general business purposes. The Society will not send you any non-associated marketing literature as part of this account. The Data Controller is West Bromwich Building Society.

You have the right of access to your personal records held by West Bromwich Building Society for the Accelerated Growth Bond, subject to payment of a small fee. You also have the right to have any inaccuracies corrected.

DECLARATION APPLICABLE TO ACCELERATED GROWTH BOND

I declare that the sum shown is being invested in the Accelerated Growth Bond manufactured by West Bromwich Building Society by me as sole beneficial owners and any money invested does not belong to a company or other corporate body. I for my part agree to be bound by the Rules of the West Brom, a copy of which is available from them. I have read the Terms and Conditions of the account in which I wish to invest which are set out in the Accelerated Growth Bond brochure, and this application form. I understand that the terms and conditions relating to this account set out in the Accelerated Growth Bond brochure and the terms of this declaration apply to my investment and the subsequent conduct of the account. I agree to the order in which the account holders' name will appear in the West Brom's records. I understand that this is important since only the first account holder has voting and other rights as 'representative joint holder' under the West Brom's Rules, and it may also affect who (ie me) would receive any windfall benefits.

ADDITIONAL DECLARATION FOR CHARITABLE ASSIGNMENT I agree to be bound by the Agreement to Assign Windfalls to Charity as set out in the product brochure.

N.B. Please note that you must sign below in order for us to process your request.

WARNING: FALSE STATEMENTS MAY RESULT IN PENALTIES OR PROSECUTION

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.

ADDITIONAL DECLARATION FOR CHARITABLE ASSIGNMENT

I agree to be bound by the Agreement to Assign Windfalls to Charity as set out in the product brochure.

Signed:

Date:

ADVISER DETAILS

Company name

Adviser name /network

Address:

Tel No.:

FSA No.

Certified copies of the money laundering documents are included

Tick here to confirm: