Post Office savings application form



All sections marked with a red * must be completed; any missing information may delay your application.

- Please write in BLOCK CAPITAL LETTERS and BLACK ink inside the boxes.
- Make sure you've viewed the Summary Box Leaflet and Key Information Pack alongside this application.
- To apply, please post this application form to Post Office Savings, PO Box 87, Armagh BT61 0BN.

Which product are you applying for? (Please select only	one product)
Instant Saver	Growth Bond 1 year 2 year 3 year
A. First applicant (or Donor or child aged 11-15)	Second applicant (or Attorney or adult representative of child) If applying as Attorney for the first applicant (Donor) please tick here If applying as adult representative of a child aged 11-15 please tick here
Title* Date of birth* Gender*	Title* Date of birth* Gender*
D D M M Y Y Male/Female M/F	D D M M Y Y Male/Female M/F
First name*	First name*
Middle name	Middle name
Surname*	Surname*
House/flat number and/or house name*	House/flat number and/or house name*
Street*	Street*
Town and county*	Town and county*
Postcode*	Postcode*
If both applicants share the same address details please tick here	
Contact details*	
We may use these details to update you on the progress of your application, to remind you of you	ur maturity date or a rate change, or to enable additional security features.
Email address* (max. 55 characters) (if 16 and over)	Email address* (max. 55 characters) (if 16 and over)
Primary phone number*	Primary phone number*
Timal y profile number	Tilliary phone number
Mother's maiden name*	Mother's maiden name*
	Product 3 marder name
What is your employment status?*	What is your employment status?*
Employed Self-employed Unemployed	Employed Self-employed Unemployed
Retired Homemaker Student	Retired Homemaker Student
Minor	Minor

Occupation and employer's industry?*		Occupation and employer's industry?*
(only complete if employed or self-employed)		(only complete if employed or self-employed)
Your country of birth*		Your country of birth*
Country of nationality*		Country of nationality*
How long have you been a UK resident?*		How long have you been a UK resident?*
Less than 2 years Between 2-3 years 3 years or more		Less than 2 years Between 2-3 years 3 years or more
B. Important information about you		
First applicant		Second applicant
(or Donor or child aged 11-15)		(or Attorney or adult representative of child – this information is taken so that we can verify you, please complete as if you were opening an
		account for yourself)
1. Which of the following do you currently have or receive?*		1. Which of the following do you currently have or receive?*
(Select all that apply)		(Select all that apply)
A. Existing savings/lump sum		A. Existing savings/lump sum
B. Salary/bonuses		B. Salary/bonuses
C. Pension income/lump sum		C. Pension income/lump sum
D. Investment income/lump sum		D. Investment income/lump sum
E. Rental income/money from property sale		E. Rental income/money from property sale
F. An inheritance/money from family/known person		F. An inheritance/money from family/known person
G. State benefits		G. State benefits
H. Gift (please specify source below)		H. Gift (please specify source below)
2. From the answers you gave in Question 1 above, which of		2. From the answers you gave in Question 1 above, which of
these will be the main source of deposits you make to your new account?*		these will be the main source of deposits you make to your new account?*
(write in the letter from the answer given)		(write in the letter from the answer given)
3. Do you receive income from outside of the UK, EU, EEA,	Y/N	3. Do you receive income from outside of the UK, EU, EEA, Y/N
USA, Canada, Australia or New Zealand?*		USA, Canada, Australia or New Zealand?*
If Yes, which country/countries do you receive income from?		If Yes, which country/countries do you receive income from?
(write in all that apply)		(write in all that apply)
_		
4. Are you a US citizen?* Yes	No	4. Are you a US citizen?* Yes No
5. Are you resident for tax purposes in any country or	No	5. Are you resident for tax purposes in any country or
territory other than the United Kingdom?* If you have ticked 'Yes' to either of the last two questions, please process.		If you have ticked 'Yes' to either of the last two questions, please provide
the following – without these you will not be able to open an account		the following – without these you will not be able to open an account.
Country Tax Identification Number		Country Tax Identification Number
(if you do not enter a TIN, we will you asking for this information be		(if you do not enter a TIN, we will write to you asking for this information before we
can accept your application)	iore we	can accept your application)
1.		1.
2.		2.
3.		3.
6. What is the purpose of this savings account?* (please tick only one op	otion)	
		Christmas
Education For a big purchase (e.g. c	car, TV, etc	.)
For my children/family Other (please specify)		
A rainy day		
House		

C. Your new Post Office s	avings produ	ct									
Amount of deposit* Instant Saver Min. £100, max. £1m Growth Bond Min. £500, max. £1m	£										
	nothed only and co	amplete the acco	ount no a	and cort code	/account na	mo fiolds)					
Method of payment* (select one m	Account no.	implete the acci		Sort code	raccount nai	me netus)					
Personal cheque NOT a business cheque				-	-						
Post Office savings account transfer (see FAQs)	Account no.		<i>A</i>	Account name	e						
D. Linked account*											
Please give us the bank or building Without a linked account we won't	t be able to open th	ne savings accou	unt you're	e applying for	r.					name(s)).
If completing as Attorney, please p	rovide linked acco	unt details for ti	ne Donor	r as the linked	a account mu	ust be in th	e name	of the Do	nor.		
Name on account				What w	vill we us	e this li	nked a	account	t for?		
	+	\square		Growth B	ond – for int	terest payı	nents				
	\bot	\Box		If you have	e chosen a 2	or 3 year b	ond, yo	ou must e	ither:		
				Tick here t	to have your	interest ac	lded to	your bond	d annually:		
Sort code				or							
					f you'd prefe ked account		rest to k	be paid ar	nnually		
Bank account number					ver – electr		actions				
					nic transact				vour linke	d accoun	+
Bank name				7 ttt CtCCtrC	The cransact	ions mase	oc maa	C 11 0111, CO	your time	a decoun	
Building society roll number (if appli	icable)										
E. Declaration and your si Tyour data: full details about how found in the Post Office Privacy Po	w your information					and Bank o	of Irelan	d (UK) plo	c (Bank of	reland) d	can be
• The types of personal information		• Who your pers									
 How your personal information is 		Your personal									
You will find the summarised Post https://www.bankofirelanduk.com/	/po-notice	•				,					
When you apply for a Post Office s Attorney's identity). If these checks make sure you have permission to s	s don't work, we m	ight ask you for	documer	nts to prove y							unt,
To process your application, we'll share your information with credit reference agencies. They'll give us details about you to confirm your identity, prevent fraud and review your financial history. We also use this information to manage your account and ensure you're eligible for our products.					event						
If you use our banking services, we may regularly check with credit reference agencies to manage your account. These agencies will share your information with other organisations and link your data with your spouse, joint applicants or their financial associates.											
We'll also share your information with fraud prevention agencies. This is to check your identity and stop fraud and money laundering. If fraud is detected, you could be denied certain services, finance or jobs. We'll carry out searches on all applicants.											
To learn more on how credit reference and fraud prevention agencies use your data, please see the Bank of Ireland UK Privacy Notice at https://www.bankofirelanduk.com/po-notice This also sets out your rights under data protection laws.											
If you opt into our marketing consents, we will send you offers, exclusive deals and the latest information on products and services available to you from across Post Office Limited and its subsidiaries. Our partner Bank of Ireland (UK) plc would also like your consent to tell you about similar financial products											
and associated services provided through our partnership, for example offers of new rates or additional credit where relevant. Our Privacy Policies inform you about how we use your personal details for marketing and what to do if you change your mind. Please read our Privacy Policies, which can be found at postoffice.co.uk/privacy and bankofirelanduk.com/po-notice											
Please tick the boxes below to inc	· ·			· ·		st.					
Any marketing preferences will app	· ·						ng prefe	rences wi	ll apply to	the Dono	or only.
Post Email Text	Phone										
Please note that if you have any otl above, please allow for a short per					oducts and h	nave provid	ed a dif	ferent pre	eference to	those p	rovided
(For joint savings accounts, both a information, you should ask us before	applicants must s	ign.) Please rea			ou have bee	en given. If	you hav	e any que	estions or y	ou need	more
I/We confirm the information provi					_						
I/We confirm receipt of the Deposit								thoriti '	n other	untrin	
I/We acknowledge that the informaterritories. I agree that I will notify becomes inaccurate.											

First applicant, minor, or adult representative (if minor unable to sign)	Second applicant, adult representative or Attorney for account holder
Signature*	Signature*
Date* D D M M Y Y Y Y	Date* D D M M Y Y Y Y

If you are under 18 or applying under Power of Attorney, you will need to provide documents, including proof of your identity, with your application. For a list of acceptable documents, please phone **0800 1697500** or view the relevant product's Key Information Pack.

Please print this form, complete and return by post with your cheque (if applicable) to:

Post Office Savings PO Box 87 Armagh BT61 0BN Branch code (if known)

If you wish to apply in a Post Office branch, please complete the application form available in branch.

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