

**WITHDRAWAL INSTRUCTIONS**

Joint Account – The signature of any one of us or the survivors shall be a sufficient discharge for all withdrawals.

If all signatures required please tick

Trust/Nominee Accounts – All/  (insert no. of signatures required) signatures shall be a sufficient discharge for all withdrawals. I/We understand that the trust deed should be produced. An inspection of the trust deed is for limited money laundering prevention reasons and the Society is not fixed with notice of the terms of the trust deed.

**DECLARATIONS**

I/We the person(s) whose signature(s) appear(s) on this form declare that the sums to be invested in this account will be held by me/us as:

Either sole beneficial OR joint beneficial owners

I/We understand that interest will be payable net of the appropriate rate of income tax (which may be reclaimed by non-taxpayers) or subject to the required certification, gross.

Where there is more than one investor this form must be signed by each of the joint investors.

The Society may at its discretion require the signatures of all joint account holders to operate the account.

Under the provisions of the Building Societies Act 1986, the Society is obliged to provide access to the latest Summary Financial Statement to all first time savers. The Summary Financial Statement may be accessed at [www.theprogressive.com/downloads/](http://www.theprogressive.com/downloads/). Alternatively, if you wish for the Summary Financial Statement to be posted to you please tick the box

If you do not wish to receive from the Society information for marketing purposes about other products and services, please tick this box

I/We have read and agree to be bound to:

- agreement to assign windfalls to charity
- the Data Protection Act 1998

I/We have read the Declarations contained in this document and accept their terms.

SIGNATURES: (All investors, including executors, administrators and nominees, etc. must sign).

1.

2.

Date

PERSONAL IDENTIFICATION AND PROOF OF YOUR HOME ADDRESS WILL BE REQUIRED WHEN YOU OPEN A NEW ACCOUNT

**FOR BRANCH USE ONLY**

Account No.

Date Opened

Customer No.

Customer No.

Investor	Form of ID Produced	Ref. No./Serial No.	Original Document Checked & Copied	Issue Date/ Valid Until	Cashier's Initials
1					
2					

Investor	Form of ID Produced	Ref. No./Serial No.	Original Document Checked & Copied	Issue Date/ Valid Until	Cashier's Initials
1					
2					

IF POSTAL APPLICATION PLEASE TICK

INVESTOR EXEMPT FROM CHARITABLE ASSIGNMENT

*Branch Agent*

**HEAD OFFICE**

Progressive House, 33/37 Wellington Place,  
Belfast BT1 6HH. Tel: (028) 9024 4926 Fax: (028) 9033 0431

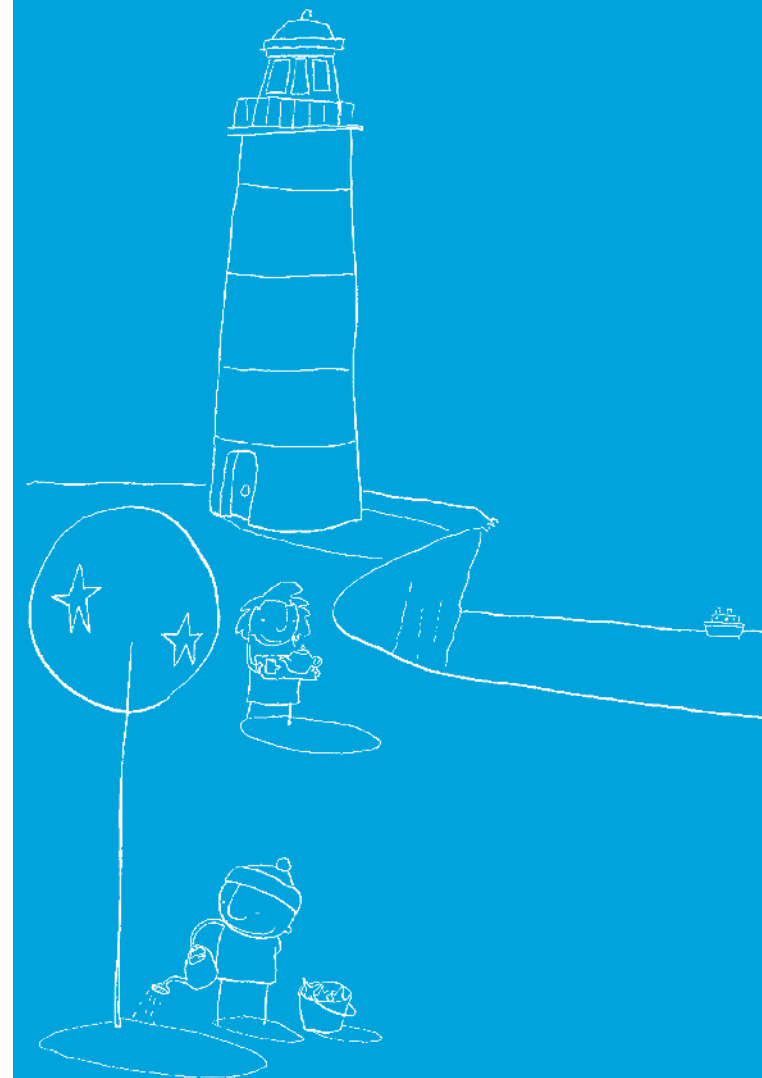
Progressive Building Society is authorised and regulated by the Financial Services Authority (FSA), and is entered in its Register under number 161841. The Society is a Member of the Building Societies Association and the Financial Services Compensation Scheme. The Society has an internal complaints procedure. Complaints that we cannot resolve may be referred to the Financial Ombudsman Service. The Society is authorised for Trustee Investment.

Progressive Building Society is a participant in the Financial Services Compensation Scheme established under the Financial Services and Markets Act 2000. Further details are available on request from the Society or by visiting our website: [www.theprogressive.com](http://www.theprogressive.com) or the Financial Services Compensation Scheme website: [www.fscs.org.uk](http://www.fscs.org.uk)

Unless otherwise agreed, the law of Northern Ireland will apply and all communications and documentation in relation to this contract will be in English.

**Northern Ireland's Building Society  
with Branches & Agents across the Province**

[www.theprogressive.com](http://www.theprogressive.com)



**PLEASE COMPLETE ALL SECTIONS USING BLOCK CAPITALS**

Type of account to be opened

(Max £1Million)

Please invest £  in accordance with the

rules and regulations of the Society and the current terms and conditions.

**FIRST APPLICANT PERSONAL DETAILS**

Mr  Mrs  Miss  Ms  Other

Forenames

Surname

D.O.B.

Nationality

Residential Address

Postcode

Full Correspondence Address (if different from above)

Postcode

Daytime Tel. No.

Mobile No.

Email

**OCCUPATION DETAILS**

Occupation

**INCOME**

Please use a tick box to indicate the range of income

Less than £10,000  £50,001 to £75,000

£10,001 to £25,000  £75,001+

£25,001 to £50,000

Have you ever held or do you currently have any accounts with the Society?  Yes  No

If yes, please provide your account number/s if known.

Mother's Maiden Name (Security Identifier)

Your Place of Birth (Security Identifier)

**SECOND APPLICANT PERSONAL DETAILS**

Mr  Mrs  Miss  Ms  Other

Forenames

Surname

D.O.B.

Nationality

Residential Address

Postcode

Full Correspondence Address (if different from above)

Postcode

Daytime Tel. No.

Mobile No.

Email

**OCCUPATION DETAILS**

Occupation

**INCOME**

Please use a tick box to indicate the range of income

Less than £10,000  £50,001 to £75,000

£10,001 to £25,000  £75,001+

£25,001 to £50,000

Have you ever held or do you currently have any accounts with the Society?  Yes  No

If yes, please provide your account number/s if known.

Mother's Maiden Name (Security Identifier)

Your Place of Birth (Security Identifier)

**NOMINEES/EXECUTORS/ADMINISTRATORS**

Is this a Nominee Account  Yes  No

If the account is to be held and operated on behalf of a beneficiary please provide their details

Name   
Address   
  
Postcode

D.O.B.

Purpose of Power of Attorney/Care & Protection Order.

**SOURCE OF FUNDS**

Please tick as appropriate

From another financial institution

Savings

Inheritance

Other (Please specify)

**EXPECTED METHOD TO BE USED TO FUND ACCOUNT**

Cash

Direct Credit  (e.g. by standing order from a bank account)

Cheque

Transfer from another Progressive Account

**EXPECTED USE OF ACCOUNT**

Regular Saving

Saving for specific purpose

General account for paying bills etc

Other – Please specify

Expected number of transactions per month

**INTEREST INSTRUCTIONS**

If you are entitled to receive tax-free interest on this account, please enclose a fully completed R85 form. This is available from [www.hmrc.gov.uk/menus/otherforms.htm](http://www.hmrc.gov.uk/menus/otherforms.htm) or by contacting your local branch

Please add interest to: (Please tick one of the following)

My/Our Account

Another Progressive Building Society Account

Account Number

The following Bank/Building Society

Bank/Building Society Name

Branch

Sort Code

A/c No.

A/c Name/Ref.

I would like my interest paid:

Annually - Once a year (all accounts)

Monthly - Every month (Fixed Term Bonds, Capital Bond & Premium 90)