



# Postal Notice Account

**P R O G R E S S I V E**  
BUILDING SOCIETY

## PERSONAL DETAILS 1<sup>ST</sup> APPLICANT

If you currently or have previously held an account with the Society, please tick this box

Enter an existing or previous account number held with the Society

Title	Forename(s)	Surname	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

National Insurance Number  Marital Status

Address (Must be a UK resident)  Daytime Tel No

Mobile No

Postcode  Email

Have you been at this address for more than 3 years?  Y/N If no please provide your previous address

Postcode

Mother's Maiden Name  Place of birth

### Occupation Details

Occupation

### Income

Please use a tick box to indicate the range of income

Less than £10,000  £10,001 to £25,000  £25,001 to £50,000  £50,001 to £ 75,000  £75,001 +

## PERSONAL DETAILS 2<sup>ND</sup> APPLICANT

If you currently or have previously held an account with the Society, please tick this box

Enter an existing or previous account number held with the Society

Title	Forename(s)	Surname	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

National Insurance Number  Marital Status

Address (Must be a UK resident)  Daytime Tel No

Mobile No

Postcode  Email

Have you been at this address for more than 3 years?  Y/N If no please provide your previous address

Postcode

Mother's Maiden Name  Place of birth

### Occupation Details

Occupation

### Income

Please use a tick box to indicate the range of income

Less than £10,000  £10,001 to £25,000  £25,001 to £50,000  £50,001 to £ 75,000  £75,001 +

## NOMINATED BANK ACCOUNT FOR THE PAYMENT OF ELECTRONIC WITHDRAWALS

Bank/Building Society Name  Branch

Sortcode  A/c No.  A/c Name/Ref

This must be a bank account in the name of the Postal Notice Account Holder and the bank account to which your future payments will be made.

**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 calling 0845 6028116

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

My/Our Account  Another Progressive Building Society Account  A/c No

The following Bank/Building Society  Bank/Building Society Name

Branch

Sortcode    A/c No.       A/c Name/Ref

**HOW TO MAKE YOUR INITIAL DEPOSIT**

I/We enclose a personal cheque for £  Issue Number

- Your cheque should be made payable to Progressive Building Society and the name in which your account is to be held. e.g. 'Progressive Building Society- John Smith'
- No third party cheques will be accepted ( i.e. company drafts, dividends or cheques drawn on other personal names)
- Your cheque must be drawn on a UK personal bank account
- If your application is in your sole name, your cheque should be drawn on a personal account in the exact name as the applicant. For joint applicants your cheque should be drawn on a joint personal account in the exact names of the applicants, or if you do not have a joint account, your cheque should be drawn on a personal account in the exact name of one of the applicants.

**DECLARATIONS** *(Delete as appropriate)*

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

The Society may confirm your identity for anti money laundering purposes and this may include checking the electoral register. If we are unable to check your identify from the information you have given us, we will request that you provide documentation as proof of your identity/address.

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

- the terms and conditions of the Postal Account
- agreement to assign windfalls to charity (see terms and conditions note 54)
- the Data Protection Act 1998 (see terms and conditions note 55)

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

**SIGNATURES**

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

1<sup>st</sup> Applicant's Signature

Date

2<sup>nd</sup> Applicant's Signature

Date

**Please ensure that the following are enclosed along with your application so that we can open your account as quickly as possible:**

A completed and signed application form

A signed personal cheque drawn on the exact names of those in which the account is to be opened

If applicable, a completed and signed HMRC form, R85

**FOR BRANCH USE ONLY**

Account No

Date Opened

Customer No

Customer No

Identification

INVESTOR EXEMPT FROM CHARITABLE ASSIGNMENT