

# Trust Savings Account Product Switch Form

(Please note this form is only to be used for the transfer of one Trust Savings product to another. For change of Trust details, signing instructions or interest instructions, please request the relevant form(s) from a member of staff).

**ACCOUNT HOLDER(S)**

Trust Name:

Address:

Contact telephone number:

Email address:

**EXISTING PRODUCT AND ACCOUNT NUMBER**

Product Name:

Account No

**NEW PRODUCT NAME**

The new Product I wish to convert to:

**HOW ARE YOU EXPECTING TO USE THE ACCOUNT?**

Please tick the box that applies:

- School fees
- Long term savings
- Disbursements
- Asset maintenance
- Care home fees
- Other (If other please state)

**MARKETING AND COMMUNICATION PREFERENCES**

Choose your preferences to receive updates from us.  
As a Member, at times we will contact you about our services and any improvements we make, or any changes to your account. You can also choose to opt in to receive any marketing communication from us regarding our products and promotions in any of the channels below:  
Post  Email  SMS  Telephone   
We also provide our communication and documents in alternative formats.  
Please select the following if they are required: Large print  Braille   
Or you can request the above by calling our Member Services Team on 01582 765 411 - Option 1

**IMPORTANT: PLEASE READ AND SIGN THE DECLARATION BELOW**

**IMPORTANT DECLARATION**

By submitting this application I/we declare that:

1. All information supplied is true and accurate to the best of my knowledge.
2. I have permission and authority to apply for this account on behalf of the Trust, Trustees and Beneficiaries and they are aware that their information has been shared with Harpenden Building Society for this purpose.
3. I understand that to comply with its legal and regulatory obligations the information supplied in this application will be verified. Harpenden Building Society uses third parties to verify the information, one being SmartSearch which will leave a non-credit footprint on the applicable record. A record of the output will be supplied to Harpenden Building Society and retained.
4. As detailed in the relevant account terms and conditions, I understand how the information I have provided will be processed, my rights and how to contact the Data Protection Officer.
5. I/We agree to the specific terms and conditions applying to the account, the General Terms & Conditions for Business Deposit Accounts and to be bound by the rules of the Society (a copy of which is available on the website and/or can be posted to you upon request).

Tick to confirm you have read and accept the above declaration statements which constitute our agreement.

On behalf of the Trust, Trustees and Beneficiaries - This must be signed by a **Trustee or Beneficiary**.

Name: .....

Signature: ..... Date: .....

You are confirming the receipt of the Financial Services Compensation Scheme Information Sheet and Exclusions.

**PRIVACY NOTICE**

- Data Protection regulations require Harpenden Building Society (the Society) to inform customers about how their personal data will be processed.
- Personal data includes customer's name, addresses, financial information and other personal information needed for opening an account.
- The Society will restrict its processing of your personal data to the minimum required to open and manage your account, update you on your account status and inform you of any new savings products. Your personal information will also be processed to comply with the Society's legal and regulatory obligations and to ensure that we continue to operate the Society in a way to safeguard your investment.
- The Society will not send you marketing material on any other services and will not share your personal details with any other organisation for marketing purposes, without your consent.
- Your personal details will be stored securely by the Society and its specialist suppliers, in countries that have equivalent data protection rules, and will only be used to communicate with you whilst you have an account with the Society.
- Further information on how the Society handles your personal data is available under the 'Privacy' menu option on our website.
- You are entitled to request the Society to restrict its use of your personal data. If you have any questions about how we manage your personal data, or wish to make a complaint, please contact the Data Protection Officer in the first instance on: [privacy@harpendenbs.co.uk](mailto:privacy@harpendenbs.co.uk).
- If you are not satisfied with the handling of your complaint by the Society, you can also make a complaint to the Information Commissioner's Office on: [ico.org.uk](http://ico.org.uk).

**NEXT STEPS**

- Send your completed form to us by post at: Harpenden Building Society, Mardall House, 9-11 Vaughan Road, Harpenden AL5 4HU OR by email to [specialistaccounts@harpendenbs.co.uk](mailto:specialistaccounts@harpendenbs.co.uk)
- Or you can leave your completed form with any members of our Team in any of our branches.
- We will contact you (and any other authorised users) within two business days on receipt of your form.
- If you need any support completing this application please contact the team on 01582 765411 Monday-Friday 9am-5pm, excluding bank holidays.
- Further information can be found on our website at [www.harpendenbs.co.uk](http://www.harpendenbs.co.uk).

Leave us a review with Smart Money People

Visit [harpendenbs.co.uk/your-feedback](http://harpendenbs.co.uk/your-feedback)



View our Trust Savings FAQs

Visit [harpendenbs.co.uk/trust-savings-faqs](http://harpendenbs.co.uk/trust-savings-faqs)



Useful Documents to help manage your trust account

Visit [harpendenbs.co.uk/trust-savings-usefuldocs](http://harpendenbs.co.uk/trust-savings-usefuldocs)



**FOR OFFICE USE ONLY**

**BRANCH:**

CIN (1)		CIN (2)	
ID (1)		ID (1)	
ID (2)		ID (2)	
Date opened:	Initials:	Date checked:	Initials: