



**Agreement to assign windfalls to charity**

**Note:** This Agreement does not apply to you if:

- (i) you have held shares in the Society (other than permanent interest bearing shares) at all times since 29th February 2000 or
- (ii) you have already entered into an agreement in either the same or similar terms with the Society and have held shares in the Society (other than permanent interest bearing shares) continuously since the date the account for which you were then applying was opened or
- (iii) you are, in respect of the account for which you are now applying, in one of the other groups of people that the Society has decided should be exempt\*.

Where more than one of you is signing this form, the above Note and, if applicable, the rest of this Agreement apply to each of you separately.

1. I agree with the Society that I will assign to the **selected charity** my right to receive any **windfall benefits**. I authorise the Society and any **successor** to pass any **windfall benefits** direct to the **selected charity** (or to any other registered charity which the **selected charity** may nominate) without giving any notice to me. I understand that the **selected charity** will have the benefit of this Agreement, and that neither it nor the Society will release me from it or vary its terms, even if the Society decides at some stage in the future that new shareholding members generally will not be required to enter into similar agreements. I authorise the Society to give the **selected charity** any information about me and any account that I have with the Society (either now or in the future) but only if the **selected charity** reasonably needs it for any purpose arising out of this Agreement. I understand that if the Society no longer exists following a merger with another building society, this Agreement will still apply between me and the other society.
2. In this Agreement:
  - (a) "**selected charity**" means the Skipton Building Society Charitable Foundation or, if it ceases to be registered as a charity, any other registered charity selected by it;
  - (b) "**windfall benefits**" means any benefits which I may become entitled to as a shareholding member of the Society under the terms of any future transfer of the Society's business to a **successor** (i.e. on a conversion or take-over), where the transfer to the **successor** is publicly announced within five years of the day on which I become a holder (either sole or joint) of the account for which I am now applying (or such shorter period as applies to me if I am in one of the groups of people that the Society has decided do not need to agree to the usual five year period\*). The expression "**windfall benefits**" does not include either (i) the right to have savings in a share account with the Society replaced by savings in a deposit account with the **successor** or (ii) if I am in one of the groups of people that the Society has decided may keep some or all benefits\*, those benefits which the Society has decided I may keep; and
  - (c) "**successor**" means any company or other corporate body to which the Society transfers its business under Section 97 of the Building Societies Act 1986 (or under any provision which amends or replaces it).

\* Details of these groups and (where applicable) the shorter periods that apply and the benefits that may be kept are available from the Society. The number and composition of the groups may be changed from time to time but no change will apply retrospectively.

**Declarations**

- (a) I confirm that I have received: (i) the marketing literature relating to the account I am opening and (ii) the Investment Terms and Conditions and agree to be bound by them and the Rules of the Society (copies of which are available upon request) and any subsequent Terms and Conditions and Rules for the time being in force.
- (b) I confirm that I am aware that the type of account I am opening is a share account and I understand that only the first named account holder will initially be recorded in the Society's records as the Representative Joint Shareholder for the account. Subject to the Rules of the Society, only the Representative Joint Shareholder will have voting rights.

- (c) I declare that any share(s) acquired by me under this account will not be held as a bare trustee (or in Scotland as a simple trustee) for a body corporate, or for persons who include a body corporate.
- (d) If any provision relating to this account is unenforceable for any reason this will not affect the enforceability of any other provision.

**Your Personal Data**

- (e) For the purposes of the Data Protection Act 1998 the Society is the Data Controller responsible for the processing of my personal data. I understand that I may request in writing, upon payment of a fee, a copy of the details held about me by the Society and where necessary rectify the information that is held about me.
- (f) I agree to the processing of my personal data for the purposes of opening and administering my account, contacting me where necessary, fraud prevention and detection, legal and regulatory compliance, marketing and market research, statistical analysis and after closure of the account for statutory, regulatory, accounting, auditing or other lawful requirements.
- (g) I consent to the disclosure of details about the progress of my application to my Solicitor or other third party acting on my behalf if the application was submitted by them with my authority. I consent to the Society using and disclosing the information contained in my application form and about my account to prevent, or detect fraud, or to assist in verifying my identity, the Society may make searches of Group records and at fraud prevention and credit reference agencies who will supply information. This information may also be used for the prevention of Money Laundering as well as the ongoing maintenance of my account.
- (h) If false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention agencies to prevent fraud and money laundering.
- (i) Further details explaining how the information held by fraud prevention agencies may be used can be obtained by writing to Compliance department, Skipton Building Society, The Bailey, Skipton, North Yorkshire BD23 1 DN, or from our website at [skipton.co.uk](http://skipton.co.uk)

**Marketing Consent**

- (j) I consent to the Society using the information contained in this form and analysing the operation of my account for marketing purposes to allow it to provide details of products or services it may believe to be of interest to me. I understand that I can request not to be received any details about the Society's products and services by writing to The Bailey, Skipton BD23 1DN, or by ticking the relevant box Applicant 1  Applicant 2 .
- (k) I consent to the information provided being shared by the Society with other companies within the Skipton Building Society Group, a list of which is available from the address below, for marketing purposes. I understand that I can request that the Society does not share my personal details with these companies by writing to The Bailey, Skipton BD23 1DN, or by ticking the relevant box Applicant 1  Applicant 2 .
- (l) I consent to the Society contacting me by telephone or other electronic media, for marketing purposes to provide details about its products. I understand that I can request not to be contacted by these means by writing to The Bailey, Skipton BD23 1DN, or by ticking the relevant box Applicant 1  Applicant 2 .

Usual signature(s) –  
(The signatures of all individuals named as account holders are required).

1. \_\_\_\_\_  
Date - \_\_\_\_\_

2. \_\_\_\_\_  
Date - \_\_\_\_\_

**For Skipton Building Society office use only (must be completed in BLACK)**

Input by	Date	Checked by	Amended by	Account No.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Principal Office, The Bailey,  
Skipton, North Yorkshire BD23 1DN  
Telephone: 0800 87 66 010\*

[skipton-intermediaries.co.uk](http://skipton-intermediaries.co.uk)

Skipton Building Society is a member of the Building Societies Association.  
Authorised and regulated by the Financial Services Authority under registration number 153706.  
\*To help maintain service and quality, some telephone calls may be recorded and monitored.

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