

**This form can only be used for a bereavement case where an adult needs to hold a Smart Account or Future Saver on behalf of a child**

## Customer checklist

- Valid account number
- Existing account holders details
- Account holders to be added details including:
  - Address
  - Date of birth
  - Contact number
  - Customer number
  - Previous name and address if applicable
- New account holder to sign
- If answered YES to all of the above, please visit your local branch with identification for validation purposes.

**If the account holder to be added does not currently hold any Nationwide accounts or have a valid Nationwide customer number, please visit a Nationwide branch with identification to have a profile set up.**

## Addition of an account holder



Building Society

- Before you complete this form, please see how Nationwide uses your information by visiting [nationwide.co.uk/privacy](https://nationwide.co.uk/privacy)
- This form will be scanned electronically; please write inside the boxes in BLOCK CAPITALS using black ink as this will help us to process your request faster
- Please DO NOT cross out any sections that you do not need to complete.
- This form is used for Savings accounts and the following current accounts FlexBasic, FlexAccount (without travel insurance), FlexDirect.
- We need to let you know about our most recent summary financial statement and auditors' report. These are published on our website and you can view them by searching for 'results and accounts' on [nationwide.co.uk](https://nationwide.co.uk) and selecting the relevant year on our results and accounts page. If you click on the 'Review of the year' document, you will find our summary financial statement inside. If you click on the 'Annual report and accounts' document, you will find our auditors report inside.

### Account to which an account holder is to be added

Sort code (if there is one)

Account number

How do you want the joint account to operate (including withdrawals)

Any one signature required

All signatures required

(Not available on current account and other card accounts)

### Existing Account Holder's Details

Title (please mark X in the box that applies to you or state your title)

Mr  Mrs  Miss  Ms  Other

Please enter ALL forenames

Surname

Contact phone number

National Insurance number

E-mail address

We'll sometimes use this email address and phone number to get in touch about the application, or tell you something important about the account.

### Account holder to be added

Customer number

National Insurance number

Title (please mark X in the box that applies to you or state your title)

Mr  Mrs  Miss  Ms  Other

Please enter ALL forenames

Surname

If your name has changed in the last 3 years PLEASE TURN OVER and provide your previous name in the account holder to be added previous name section

Date of birth

Nationality

(required for regulatory reasons)

Permanent residential address

Property number

and/or Property name

Street

Town

Postcode

When did you start living there?

If you have lived there for less than 3 years, please mark X in this box and provide your previous address overleaf

E-mail address

Telephone numbers

Home

Mobile

Work

Extension (if applicable)

We'll sometimes use this email address and phone numbers to get in touch about the application, or tell you something important about the account.

Can you confirm that you are NOT a US citizen AND that you are ONLY resident in the UK for tax purposes? Yes  No

If NO, please answer the following questions:

Are you a US citizen? Yes  No

If yes please provide your Tax Identification Number (TIN):

TIN

(this will be shown on letters from that country's tax authority)

Other than the UK, please list all the countries where you are resident for tax purposes and provide your TIN for each:

Country 1

Country 2

Country 3

TIN 1

TIN 2

TIN 3

### Your marketing preferences – putting you in control

Happy for us to send you marketing information we think you'll be interested in?

New Account Holder - Emails: Yes  No  Letters: Yes  No  Calls: Yes  No

Whatever you decide, we'll never pass on your details to anyone else for their marketing purposes. To find out how we use your info, and keep it safe, please visit [nationwide.co.uk/privacy](https://nationwide.co.uk/privacy)

**Existing account holder(s) to sign in A; new account holder to sign in B**

A) I (each of us if there is more than one existing account holder) agree to the addition of the above named person to my account and I authorise the release of any information regarding the past operation of the account to the new joint holder

1 Signature of existing account holder 1  
PLEASE SIGN WITHIN THIS BOX

2 Signature of existing account holder 2  
PLEASE SIGN WITHIN THIS BOX

Date (please write INSIDE the boxes)

D D M M Y Y Y Y

Please ensure all account holders sign this authorisation.

B) I wish to be added to the above numbered account

I've been provided with copies of the terms and conditions of the account, the declaration and, if applicable to me, the charitable assignment, and I agree to them. 'Nationwide' means Nationwide Building Society and its subsidiaries and overseas branches (which include Nationwide Trust Ltd, The Mortgage Works (UK) plc and UCB Home Loans Ltd).

By signing this application, I confirm that I have received the Financial Services Compensation Scheme Information Sheet and Exclusions List.

**Signature**

Signature of account holder to be added  
PLEASE SIGN WITHIN THIS BOX

Date (please write INSIDE the boxes)

D D M M Y Y Y Y

**Notes re Cards and PINs**

- A new card and PIN will be sent out automatically to the additional account holder
- Existing account holder(s) do not need new cards or PINs

**Notes for current account customers only**

- The joint account holder will be added to any benefits linked to the account

**Cheque Book requirements (current accounts only)**

If both holders indicate 'Yes', please confirm your preferences  
Account holder 1 Yes  No  Account holder 2 Yes  No   
1 Cheque book each  1 x Cheque book in joint names

**Previous name of account holder to be added**

Title (please mark X in the box that applies to you or state your title) Mr  Mrs  Miss  Ms  Other   
Please enter ALL forenames   
Surname

If you have had any other names in the last 3 years please tick this box  and list the details below.

**Previous address of account holder to be added**

Property number  and/or Property name   
Street   
Town  Postcode   
When did you start living there?  If you have lived there for less than 3 years, please mark X in this box  and provide your previous address below

Please hand in to your local branch for signature validation.

**Office use only**

Existing account holder Signature(s) checked  P number  Prefix   
Account holder to be added ID confirmed on Portrait  P number  Prefix   
Tax question completed if required

## Declaration, Use of my Information and Charitable Assignment

### Declaration

I agree that:

- a) you will rely on the information I have given you on this form, which I confirm is complete and true. You may decide to decline my application;
- b) as well as the account conditions, Nationwide's rules apply to this account and I can obtain a copy of these in any of your branches;
- c) the money I am investing in this account is my own and I will not use the account for business purposes;
- d) for joint current accounts only:
  - i) you can pay cheques and act on instructions signed by either of us unless you are told otherwise;
  - ii) if you give us an overdraft only one statement will be sent to the first named account holder. If we want individual statements we will tell you;
  - iii) by making this application, I'm confirming that the other applicant has agreed to share a financial relationship with me. Also, that they're happy for Nationwide to authorise searches, and for links and/or recordings of their information to be made with credit reference agencies.

### Use of my information

This is a summary of how Nationwide uses your personal information, if you'd like a more detailed explanation, please see Nationwide's full privacy statement "How Nationwide uses your information", available in branch or online at [nationwide.co.uk/privacy](https://nationwide.co.uk/privacy)

1. We collect and use your information so we can offer and manage your accounts, confirm your ID, prevent fraud, provide services to you, collect and recover debt and run our business.
2. We share your information as necessary within Nationwide, with our suppliers and with any third parties you've asked to act on your behalf. Information is shared with our insurance partners when applying for a Nationwide insurance product or it is a benefit of your account (e.g. FlexPlus).
3. If the law requires or allows us to, we'll also share information as necessary with other organisations. This includes credit reference agencies, fraud prevention agencies and other government bodies, regulators and law enforcement agencies.
4. When we share your information with credit reference agencies they'll use this to check your credit rating, along with the other details you've given us. These checks are part of most account application processes – however, they will leave a record on your credit file that other lenders can see. This might affect your ability to get credit elsewhere for a short while.
5. When we share your information with fraud prevention agencies they will use the data to prevent fraud and money laundering and verify your identity. If we believe someone poses a fraud or money laundering risk, we may refuse to provide the product they have asked for and we may also stop providing services they already have. The fraud prevention agencies will keep a record of any fraud or money laundering risk and this could mean that other organisations may refuse to provide services, financing or employment.
6. When we transfer information to third parties and organisations, whether inside or outside the UK, we'll make sure we only give them information that's necessary and that your data will stay secure.
7. We only use your information if we have a legal basis to do so, for example, if you have given us consent or if we need to use the information to meet our obligations to you in our terms and conditions. We may also use your information if necessary to comply with the law or to carry out our legitimate business interests.
8. You have certain rights when it comes to your personal information including the right to access your data. Further details on these rights and who to contact are available in branch or online at [nationwide.co.uk/privacy](https://nationwide.co.uk/privacy)
9. By making this application, I'm confirming that the other applicant has agreed to share a financial relationship with me. Also, that they're happy for Nationwide to authorise searches, and for links and/or recordings of their information to be made with credit reference agencies.

If you were a member of the Society on 2nd November 1997 and have continued to be a member since that date, the following wording does not apply to you.

### Charitable Assignment

By applying to open an account after 2nd November 1997, I also apply to be a charity member of The Nationwide Foundation ("the Foundation") unless I am already a charity member. I agree that, if the account is opened by the Society and I am or became a charity member of the Foundation, I will be bound to assign to the Foundation (or any charity(ies) nominated by it, but to no other person) the rights to any conversion benefits to which I would otherwise become entitled as a member or depositor at any time before, or within two years after, my membership of the Society comes to an end.

This agreement is irrevocable and authorises the Society to make over to the Foundation (or to any charity(ies) nominated by it) any such benefits without further notice to me. I understand that neither the Society nor the Foundation will release me from this agreement or vary its terms.

I understand that (except in the case of any class of person where the Society considers this to be inappropriate) the Society will require on behalf of itself and the Foundation that all applicants for share and mortgage accounts agree to the above condition (or a condition having substantially the same effect), unless the Society decides and announces by press release that it is no longer in the best interests of the Society to do so generally on a continuing basis. Any such decision by the Society would not have retrospective effect and I would continue to be bound by the above condition.

For this purpose "conversion benefits" means any benefits under the terms of any future transfer of the Society's business to a company (i.e. on conversion or takeover) except the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company and, if the Society merges with any other society, after the date of such merger "Society" includes such other society.

In this declaration and charitable assignment "you"/"the Society"/"Nationwide" means Nationwide Building Society and its subsidiaries and overseas branches (who include Nationwide Trust Ltd, The Mortgage Works and UCB Home Loans Ltd).