

Application for third party authority form

Application to allow an individual to act on my/our behalf for up to one year.

Account Number(s) this authority is to apply to (list all that apply)

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Saffron Building Society complies with data protection regulation and as a Data Controller, we'll only collect, store and process personal information required to open and operate the account. For more information, read our Privacy Notice that we've already given to you or view online at <https://www.saffronbs.co.uk/privacy-policy>.

Before we'll set up any Third-Party Authority on your account(s) for your trusted person, we'll need to confirm their ID and address. We'll need to see paper proof so please send this to us. Find the information we'll need in our 'Identifying you and preventing fraud' leaflet we've already given to you or visit www.saffronbs.co.uk.

Complete all sections of the form in ink. If any information is missed, we won't be able to complete your request.

Customer details – this is the person(s) granting authority

Customer 1		Customer 2	
Title	<input type="text"/>	Title	<input type="text"/>
First name	<input type="text"/>	First name(s)	<input type="text"/>
Middle name(s)	<input type="text"/>	Middle name(s)	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>

I/we need some help with managing my account(s) with Saffron Building Society. I need this help because:

<p>Reason (must be completed – or call us if you'd prefer)</p> <p>Let us know your individual needs so we can discuss with you how we can help. We'll do all we can to help make things easier for you. We'll note the support you need on your account(s) so our colleagues know how to help you whenever you contact us.</p>
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Type of Third-party authority requested

You can find details of what these are and what it is in the Savings Terms & Conditions. You'll find these at www.saffronbs.co.uk or call us and we'll send you a copy. Tell us which type of third-party you want to register (tick one).

Type of Third-Party Authority	✓	What you need to send us before we'll update our records
Savings - Third-Party Authority with us. This is a short term agreement. It will last a maximum of 12-months.		This form fully completed & signed by the Customer(s) and the Third-party. Paper proof of ID and Address of your Third-party.
Savings - Power of Attorney – General or Ordinary. This is a short term agreement. It will last a maximum of 12-months.		This form fully completed & signed by the Customer(s) and the Third-party. Certified copy of the Power of Attorney. Paper proof of ID and Address of your Attorney
Savings - Power of Attorney – Lasting or Enduring. This can only last as long as you are alive.		This form fully completed & signed by the Third-Party. Certified copy of the Power of Attorney showing its been registered with the Office of Public Guardian. Paper proof of ID and Address of your Attorney

<p>Mortgage – Third-party authority with us to discuss the mortgage account. This is a short term agreement. It will last a maximum of 12-months.</p>		<p>This form fully completed & signed by the Customer(s) and the Third-party. Paper proof of ID and Address of your Third-party.</p>
<p>Mortgage – Third-party authority with us to discuss the mortgage account and make monthly mortgage payments. This is a short term agreement. It will last a maximum of 12-months. We cannot accept payments by Direct Debit from a third-party.</p>		<p>This form fully completed & signed by the Customer(s) and the Third-party. Paper proof of ID and Address of your Third-party.</p>

Don't send original photo-ID documents by post – they might get lost in the post. You can either come into branch or send a certified copy of your photo-ID.
We'll keep a copy of the ID documents you provide. These are required to fulfil our legal obligations and will not be used for any other purposes.

What's a Certified Copy?

A certified document is one that's been signed by someone of 'good standing' to confirm that it's a 'true copy'. You can find out more about Certified Copies in our 'Identifying you and preventing fraud' leaflet at www.saffronbs.co.uk. Call us if you want us to send you a copy.

Third-Party details – this is the trusted person you are giving authority to

Title	<input type="text"/>	Date of birth	<input type="text" value="DD / MM / YYYY"/>
First name	<input type="text"/>	Country of birth	<input type="text"/>
Middle name(s)	<input type="text"/>	Relationship to Customer	<input type="text"/>
Surname	<input type="text"/>	Is Third-party an existing member of Saffron Building Society?	Yes <input type="checkbox"/> No <input type="checkbox"/> <i>(if yes, tell us the account number)</i>
			<input type="text"/>

Third-party current address

Residential address – this is where you live

House Name/ Number	<input type="text"/>	Town	<input type="text"/>
Street Name	<input type="text"/>	Post Code	<input type="text"/>
District	<input type="text"/>		

Third-party contact details

Home phone number	<input type="text"/>	Your preferred contact phone	
Work phone number	<input type="text"/>	Work <input type="checkbox"/> Mobile <input type="checkbox"/> Home <input type="checkbox"/>	
Mobile phone number	<input type="text"/>	Email address	<input type="text"/>

Third-Party Marketing Preferences

Saffron Building Society and its group companies does not market directly to third-parties.

Use of Personal Information

Your personal information is held by Saffron Building Society and may be used in a number of ways. For example, to verify your identity, for fraud prevention, to manage your account, and for statistical analysis. We will share your data with regulatory bodies, such as HMRC where we are required to do so by any regulations or legislation. You can find out more in our Privacy Notice at <https://www.saffronbs.co.uk/privacy-policy>.

Customer Declaration and Authority

Customer Declaration & Signature

I/We agree that the Third-party named above is fully authorised to operate my account(s).

I/We agree that any debt incurred to Saffron Building Society under this mandate shall be my/our responsibility and that the mandate will remain in place for:

- 1 year from the date of this form; or
- until I/We tell you to cancel the mandate (if sooner); or
- upon either of my/our deaths (if sooner).

I/We understand that any membership documents will be given back to the third-party after each transaction.

If this Authority is for a savings account(s) I/We are responsible for any withdrawals my/our Third-party makes

If this Authority is for a mortgage account(s) I/We are aware that the mortgage remains my/our responsibility. I/We understand that my/our property could be repossessed if I/We don't keep up repayments on the mortgage.

I/We can cancel this Authority at any time.

Signature 1

Signature 2

Date of Signing

Third-party Declaration & Signature

I agree that I will only operate the account in the way the customer wants me to and within Saffron's terms.

I understand that I won't have any legal claim to any money held in the Savings account(s).

If this Authority is for a mortgage account(s), I agree that:

- all rights and interests that I may have (if any), and all future rights and interests that I may have, as a person living in the property, will take second place behind Saffron Building Society's rights and interest in the property (or the money generated by any sale of the property) under the mortgage; and
- I will not try and claim any right or interest arising from living in the property and/or contributing to the monthly payments against Saffron Building Society or its subsidiary companies.

I confirm that I have received and read the Privacy Policy.

Third-party Signature

Date of Signing

You must read all documents carefully for your own protection. If you don't understand anything, contact us before you proceed.

Return to Saffron House, 1a Market Street, Saffron Walden, Essex CB10 1HX with the documents we need.