

# Additional account holder application form



Having read our terms and conditions, please complete this form in BLOCK CAPITALS ensuring that all account holders sign the declaration at the bottom of this form. Please note, if the required identity documentation or information is not provided, your application may be delayed or rejected. If at any stage you require assistance please contact us on +44 (0) 1624 696000.

Details of the account number(s) to which the following additional holder(s) are to be added:

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## 1. First additional account holder

Mr  Mrs  Miss  Ms  Other

First name(s) in full

Surname

Maiden/former name (if applicable)

Sex  Male  Female

Date of birth DD  MM  YYYY

Place of birth

Nationality

Citizenship (if different)

Correspondence address   
  
  
Post Code

Permanent Residential address (if different from above - C/O or PO boxes not permitted for residential address)   
  
Post Code

Home tel

Work tel

Fax no.

Mobile no.

E-mail address

Occupation   
(if retired, state retired and previous occupation)

Employer's name (previous if retired)

Employer's address (previous if retired)

Annual income range  £0-25k  £25-50k  £50-100k  £100k+

Relationship with first named account holder

## 2. Second additional account holder

Mr  Mrs  Miss  Ms  Other

First name(s) in full

Surname

Maiden/former name (if applicable)

Sex  Male  Female

Date of birth DD  MM  YYYY

Place of birth

Nationality

Citizenship (if different)

Correspondence address   
  
  
Post Code

Permanent Residential address (if different from above - C/O or PO boxes not permitted for residential address)   
  
Post Code

Home tel

Work tel

Fax no.

Mobile no.

E-mail address

Occupation   
(if retired, state retired and previous occupation)

Employer's name (previous if retired)

Employer's address (previous if retired)

Annual income range  £0-25k  £25-50k  £50-100k  £100k+

Relationship with first named account holder

## TO BE COMPLETED BY RESIDENTS OF THE EUROPEAN UNION ONLY

As a result of revised legislation, introduced by the IOM Government arising from the European Union Tax Savings Directive, the option of having tax deducted at source via a retention tax and in turn exemption from tax will be withdrawn on 01 July 2011. From this date, EU residents will have interest paid gross with details being provided to the Isle of Man Tax authorities (who in turn forward details to the authorities in the account holder's country of residence) under an 'Exchange of Information' agreement.

Please refer to the 'Account opening guide' or our website for full details and indicate your choice below. Please note that your chosen option will apply to all accounts that you hold with us.

1. Exchange of information
- As stated above the following options are only valid for interest paid before 01 July 2011.
2. Retention Tax
3. Exemption from tax  A separate form will be sent to you which you **must** complete and return to us

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If you have chosen Exchange of Information, please provide your Tax Identification Number (TIN) which you can usually find on any correspondence from your local tax authority. If you do not know your TIN please ensure you have provided your date and place of birth above.

TIN

TIN

How would you like to operate your account?  Any one signatory to sign  All signatories to sign together

To add an additional account holder, all existing holders and the new holder(s) must sign the declaration below.

- I/We declare that the money deposited is held by us as joint beneficial owners. In the even of the death of either/any account holder the account shall be vested in the name(s) of the survivor(s).
- I/We declare that we have read a copy of the terms and conditions and agree to be bound by them.
- I/We declare that we understand that this is a deposit account governed by Isle of Man law exclusively and that the investment, plus any interest, will only be repaid out of the company office based in Douglas, Isle of Man.

Signature first account holder:	Date
Signature third account holder:	Date

Signature second account holder:	Date
Signature fourth account holder:	Date