



## AGREEMENT TO ASSIGN WINDFALLS TO CHARITY

IF YOU HAD A SHARE ACCOUNT WITH THE SOCIETY ON 6th JUNE 2000 AND HAVE KEPT A SHARE ACCOUNT EVER SINCE THAT DATE, OR IF YOU HAVE A MORTGAGE WITH THE SOCIETY AT TODAY'S DATE, THE WORDING IN PARAGRAPHS 1 AND 2 BELOW DOES NOT APPLY TO YOU, HOWEVER, IT MUST NOT BE DELETED.

1. By applying to open a share account on or after 7th June 2000 I/we agree with the Society and the Charities Aid Foundation ("the CAF") that I/we will assign to the CAF (or to any charity(ies) nominated by it or by the Society under the provisions of a deed dated 6th June 2000 between the Society and the CAF, in which case references to the CAF shall include references to any other charity(ies), but to no other person) the rights to any relevant conversion benefits (defined below). This obligation will not apply to me/us if I/we fall within any class of persons which, as at today's date, the Society wishes to be excluded from such obligation. This agreement is irrevocable and authorises the Society to transfer to the CAF any such benefits without further notice to me/us. I/we understand that neither the Society nor the CAF will release me/us from this agreement or vary its terms and I/we will continue to be bound by the above condition even if the Society decides at some time in the future (and announces any such decision by press release or otherwise) that it is no longer in the best

interests of the Society to continue with the above assignment condition generally in respect of new members.

2. (a) "Relevant conversion benefits" means any benefits to which I/we might become entitled as a shareholding member of the Society under the terms of any future transfer of the Society's business to a company (ie on a conversion or take-over) which is completed at any time within the five years immediately following the date on which my/our share account is opened (or, if applicable, the shorter period as set out in the list available from the Society's Secretary). "Relevant conversion benefits" does not include the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company on a conversion or take-over.

2. (b) If the Society merges with any other society, after the date of such merger the "Society" includes such other society.

A list of the classes of persons which the Society currently wishes to be excluded from the obligation to assign or in respect of which a shorter period applies (which list may change from time to time but not with retrospective effect) is available on request from the Society's Secretary at its principal office.

## DATA PROTECTION

Information which you provide to the Hanley Economic Building Society or that is obtained by us through our dealings with you may be held on our computers and in other ways and used by us to administer your account, for statistical analysis, for debt collection and fraud prevention and to bring to your attention (by mail, telephone, e-mail or otherwise) products or services of the Hanley Economic Building Society or other selected suppliers which may be of interest to you. Where applicable, with respect to your agreement to assign, to the Charities Aid

Foundation or its successor(s) ("the CAF"), your rights to any relevant conversion benefits, we will pass on to the CAF such limited information relating to you and your account as may be necessary to fulfil your agreement to assign. Such information shall only be passed on to the CAF in the event that the Hanley Economic Building Society is to transfer its business to a company (i.e. on a conversion or takeover).

## DECLARATION

### I/we declare that

- I/we declare that this application form has been completed to the best of my/our knowledge and belief.
- I/we accept the conditions in the declaration above and agree that the investment is made in accordance with the terms and conditions of the account and the Rules of the Society, copies of which are available on request.
- I/we acknowledge receipt of the Society's latest Summary Financial Statement.
- I/we have read the above section entitled Data Protection. By signing this form I/we consent to the uses and disclosures of information listed.
- I/we consent by signing below that information held by the Society about me/us may also be shared by other companies in the Hanley Economic Building Society Group and that they may from time to time keep me informed of other products and services offered by them. (Your details will not be passed to anyone outside of this group without first obtaining your consent).

*If you do not wish your details to be shared and to receive details of other services and products from the Society and the subsidiaries within its group please tick the no marketing boxes following your signature.*

### Proof of identity searches

- The Society may make searches about you at credit reference agencies who will supply information, including information from the Electoral Register, for the purpose of verifying your identity. The searches will not be seen or used to assess your ability to obtain credit. The agencies will record details of the search whether or not this application proceeds. The Society may use scoring methods to assess this application and to verify your identity. By signing this application form I/we agree that the Society can use my/our information in this way.

### Single/Joint Accounts Only

- I/we hereby declare that this sum is being invested by me/us as sole beneficial owners(s) and not as trustee(s) or nominee(s) for a corporate body, or for persons who include a corporate body.

**Joint Account Instruction:** We agree that one signature is sufficient for withdrawals, closure, or amendment to the account unless this clause is deleted.

### Trustee Accounts Only

- I/we hereby declare that this sum is being invested by me/us as trustee(s) and not as nominee(s) and that to the best of my/our knowledge and belief, no company, society or body of persons (whether incorporated or not) is beneficially interested in the income therefrom.

**For accounts with more than one trustee:** We understand that the Society will require all of our signatures in order to withdraw from, close, or amend the account.

**SIGNED** - all applicants must sign - applications will not be accepted without all signatures.

1<sup>st</sup> Applicant:  
Owner Beneficiary/  
1<sup>st</sup> Trustee

Date

No marketing

2<sup>nd</sup> Applicant:  
Owner Beneficiary/  
2<sup>nd</sup> Trustee

Date

No marketing

3<sup>rd</sup> Applicant:  
Owner Beneficiary

Date

No marketing

Please indicate in the box provided how you first heard about The Hanley