

This form is to be completed by the Attorney(s)/Court Appointee(s) and signed below. It should only be used in conjunction with a Power of Attorney/Court of Protection document, i.e. where an Attorney/Court Appointee is to be registered by the Society with power to operate an account.

Please use BLOCK LETTERS and tick appropriate box(es).

SECTION 1		1ST ATTORNEY/COURT APPOINTEE	
Surname (Mr/Mrs/Miss/Ms)			
Forenames in full			
Address			
Postcode			
How many years / months have you lived at the above address?		YY	MM
Previous address (if less than 3 years at present address)			
Postcode			
Date of birth			
Nationality			
SECTION 2		CONTACT DETAILS	
Email			
Mobile			
Daytime			
Home			
SECTION 3		ACCOUNT HOLDER'S DETAILS	
Account holder's name			
Has the account holder lost mental capacity?		Yes	No
Has the account holder lost physical capacity and is unable to sign?		Yes	No

SECTION 1		2ND ATTORNEY/COURT APPOINTEE	
Surname (Mr/Mrs/Miss/Ms)			
Forenames in full			
Address			
Postcode			
How many years / months have you lived at the above address?		YY	MM
Previous address (if less than 3 years at present address)			
Postcode			
Date of birth			
Nationality			
SECTION 2		CONTACT DETAILS	
Email			
Mobile			
Daytime			
Home			
SECTION 4		LPA ACCESS CODE	
V - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			

SECTION 5		AS ATTORNEY / COURT APPOINTEE	
I/We wish to be registered (where possible) to all accounts (please tick to confirm).		<input type="checkbox"/>	
OR			
I/We wish to only be registered to the following accounts:			

FOR SOCIETY USE ONLY
ACCOUNT NUMBER
DATE ACCOUNT OPENED
BRANCH/AGENCY CODE - PRODUCT OPEN CODE

WE ASK THE FOLLOWING QUESTIONS TO HELP US GET A CLEARER PICTURE OF HOW YOU INTEND TO USE YOUR ACCOUNT AND TO HELP US MEET OUR REGULATORY OBLIGATIONS. IT'S IMPORTANT TO NOTE THAT PROVIDING INCOMPLETE OR INACCURATE INFORMATION IN YOUR APPLICATION FOR A SAVINGS ACCOUNT COULD RESULT IN DELAYS IN THE PROCESSING OR OPENING OF YOUR ACCOUNT.

SECTION 6
1ST APPLICANT
FOR A LIST OF OPTIONS TO SELECT PLEASE REFER TO YBS0123 SD, PAGE 6 OF THIS APPLICATION.

Which country were you born in?		
Do you have any other nationalities or citizenships?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If 'Yes', please provide all additional nationalities or citizenships		
Occupation		
Employment status		
Employment industry		
Source of deposit		
What is your annual income before tax? <small>(Not applicable if retired/student/home maker or unemployed)</small>	Less than £15,000	
	£15,000 - £29,999	
	£30,000 - £49,999	
	£50,000 - £100,000	
	More than £100,000	
Please tick closest income		
How much are you expecting to deposit into this account over the next 12 months? Please tick closest deposit	Less than £1,000	
	£1,000 - £4,999	
	£5,000 - £19,999	
	£20,000 - £49,999	
	£50,000 - £99,999	
More than £100,000		
Please tick closest deposit		
Will any of the money going into this account come from outside the UK?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If 'Yes', please list the countries that the money will come from		

DECLARATION
1ST APPLICANT

I certify that to the best of my knowledge, the information provided in this form is accurate and complete.

SECTION 6
2ND APPLICANT
FOR A LIST OF OPTIONS TO SELECT PLEASE REFER TO YBS0123 SD, PAGE 6 OF THIS APPLICATION.

Which country were you born in?		
Do you have any other nationalities or citizenships?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If 'Yes', please provide all additional nationalities or citizenships		
Occupation		
Employment status		
Employment industry		
Source of deposit		
What is your annual income before tax? <small>(Not applicable if retired/student/home maker or unemployed)</small>	Less than £15,000	
	£15,000 - £29,999	
	£30,000 - £49,999	
	£50,000 - £100,000	
	More than £100,000	
Please tick closest income		
How much are you expecting to deposit into this account over the next 12 months? Please tick closest deposit	Less than £1,000	
	£1,000 - £4,999	
	£5,000 - £19,999	
	£20,000 - £49,999	
	£50,000 - £99,999	
More than £100,000		
Please tick closest deposit		
Will any of the money going into this account come from outside the UK?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If 'Yes', please list the countries that the money will come from		

DECLARATION
2ND APPLICANT

I certify that to the best of my knowledge, the information provided in this form is accurate and complete.

EMPLOYMENT STATUS

- Employed
- Self-employed partner
- Self-employed sole trader

- Director or Shareholder (less than 25% shares)
- Director or Shareholder (greater than or equal to 25% shares)
- Retired

- Homemaker
- Student
- Not employed
- Minor - under 16

OCCUPATION (PLEASE SELECT THE ONE CLOSEST TO YOUR OCCUPATION)

Accountant
Actor
Administration assistant
Air Travel assistant
Analyst
Architect
Armed forces
Artist
Bailiff
Baker
Banker
Bar worker
Barber
Beautician
Bookkeeper
Bookmaker
Bricklayer
Broker
Builder
Bus driver
Business consultant
Butcher
Call centre operator
Car dealer
Care worker
Caretaker
Carpenter
Carpet fitter
Cashier
Caterer
Chartered surveyor
Chauffeur
Chef
Chief executive
Childminder
Chiropodist
Chiropractor
Civil enforcement officer
Civil servant

Cleaner
Clergy
Clerical worker
College lecturer
Community worker
Consultant
Contractor
Cook
Council worker
Customer service adviser
Dancer
Delivery driver
Dental nurse
Dentist
Designer
Director
Doctor
Dog walker
Driving instructor
Dry cleaner
Education professional
Electrician
Engineer
Environmental worker
Estate agent
Exporter
Factory worker
Farmer
Farrier
Finance manager
Firefighter
Fisherman
Fishmonger
Fitness instructor
Florist
Forest ranger
Forklift truck driver
Gardener
Hairdresser

HGV driver
Hospital worker
Hospitality worker
HR manager
Importer
IT contractor / consultant
Jeweller
Journalist
Judge
Landlord
Lawyer
Lecturer
Legal professional
Librarian
Managing director
Manual worker
Market trader
Marketing professional
Mechanic
Metal worker
Midwife
Model
Musician
Nurse
Nursing assistant
Office manager
Occupational therapist
Optician
Painter
Paramedic
Personal assistant
Pest control officer
Plumber
Police force
Political / diplomat
Postal worker
Probation officer
Production manager
Professor

Project manager
Property developer
Psychologist
Public relations person
Publican
Receptionist
Roofer
Sales manager
Scientist
Secretary
Security guard
Shop assistant
Social worker
Software engineer
Solicitor
Sports trainer
Speech therapist
Sports professional
Tailor
Taxi driver
Teacher
Teaching assistant
Technology manager
Technology systems developer
Town planner
Train driver
Travel agent
Tree surgeon
Undertaker
Underwriter
Van driver
Vet
Waiter
Window cleaner
Writer

EMPLOYMENT INDUSTRY

- Accommodation and Food Services Activities
- Activities of Extraterritorial Organisations and Bodies
- Agriculture, Forestry and Fishing
- Arts Entertainment and Recreation
- Charities
- Construction
- Cryptocurrency
- Custodial Businesses
- Education
- Electricity, Gas, Steam and Air Conditioning Supply
- Embassies
- Financial and Insurance Activities
- Gambling

- Human Health and Social Work Activities
- Information and Communication
- Manufacturing
- Military and Defence (private sector)
- Mining and Quarrying
- Other Service Activities
- Pharmaceutical Manufacturing
- Professional Scientific and Technical Activities
- Public Administration and Defence
- Real Estate Activities
- Transportation and Storage
- Water Supply; Sewerage and Waste Management
- Wholesale and Retail Trade

SOURCE OF DEPOSIT

- Dividends or company profits
- Existing savings
- Funds from other individuals
- Gift(s)
- Inheritance
- Matured investment e.g. stocks, shares

- Other insurance claim
- Pension income
- Prize funds e.g. lottery, gambling
- Sale of assets e.g. sale of car
- Life insurance policy payout

- Sale of property, including buy-to-let
- Funds from partner / spouse
- Savings from salary / income

- State benefits
- Student finance
- Virtual money e.g. cryptocurrency
- Not contributing (joint customers only)

WHAT ARE YOU SAVING FOR?

- General savings
- Pay bills
- House purchase

- Care home fees
- Special occasion (e.g. wedding)
- Holiday

- Car
- Retirement
- Further education

SECTION 7
HOW WE USE YOUR PERSONAL INFORMATION FOR POWER OF ATTORNEY

- Yorkshire Building Society decides what personal information we need to collect about you, how we use it, who we share it with and how long we keep it. This makes us the data controller of your personal information for data protection purposes.
- We will use the personal information obtained from you and additional information obtained in the course of opening and managing your account. This includes, but is not limited to, name, address, identification, account transactions and communications and where relevant sensitive information, credit reference data, financial crime data, health details, nationality and legal proceedings.

- We will respect your rights to privacy and will only collect, use, store and share your personal information where a lawful purpose applies:
- It's necessary for the performance of a contract you have or have requested to enter into.
- If we have a legal obligation.
- If we have a legitimate business interest where it does not have an unfair impact on you.
- If you have given your consent where the collection, use, storage or sharing involves special category (sensitive) personal information (e.g. health, race and religion).
- Where we believe you or another person is at risk and we need to protect your or their vital interest.
- Where it's in the public interest or we have been given official authority to do so.

HOW WE USE YOUR PERSONAL INFORMATION

When you register for Power of Attorney / Court Appointee we will use your personal information together with other information available (including relevant sensitive information, e.g. health, offences and legal proceedings or other item as appropriate) for:

- Enabling you to fulfil your duties as Attorney/Court Appointee
- Identify verification (including checking documents with issuing authorities (e.g. driving licence - DVLA)
- Processing your application
- Contacting you where necessary
- Fraud prevention and detection
- Administering your account
- Legal and regulatory compliance
- Marketing (where we have your consent) and market research
- General business purposes

We will share information with one or more Credit Reference Agencies (CRA's), now and in the future, to:

- Check your identity
- Verify the accuracy of the information you have provided
- Manage your account(s)/relationship with us
- Process your application
- Ensure any offers we send are appropriate to you
- Prevent criminal activity, fraud and money laundering

Credit Reference Agencies (CRAs) are used to perform credit, identity and fraud prevention checks against public (electoral register) and shared credit information (You can learn more about how your personal information is used by visiting <https://www.experian.co.uk/legal/crain/>)

- The personal information we have collected from you will be shared with Fraud prevention agencies such as CIFAS and National Hunter. You can learn more about how your personal information is used by visiting <https://www.cifas.org.uk/fpn> or <https://nhunter.co.uk/privacy-policy> Fraud prevention agencies can hold your personal data for different periods of time, and if you are considered to pose a fraud or money laundering risk, your data can be held for up to six years.
- Where we transfer personal information to countries outside the European Economic Area (EEA), this is always done under a contract which includes appropriate safeguards for the security and confidentiality of your personal information, with your consent, or where permitted by the Data Protection laws.
- We will only use, keep and share your personal information as required to meet our legal and regulatory obligations or to deal with your enquiry, administer, and manage your accounts, products and relationship with us. After this time, we will delete your personal information in line with the requirements of the Financial Conduct Authority, Prudential Regulation Authority, Money Laundering regulations, Financial Ombudsman Service, HMRC and any other regulatory bodies.

DISCLOSING YOUR PERSONAL INFORMATION

We may disclose your personal information with other people or organisations as follows:

- With Yorkshire Building Society and its subsidiary companies for fraud prevention, lawful purposes, account administration and for general business purposes (e.g. updating customer records, handling customer queries and complaints).
- Personal information to (i) our external auditors and regulatory bodies including Financial Ombudsman Service, Prudential Regulation Authority and the Financial Conduct Authority, and (ii) associate companies, agents and service providers including solicitors and valuers acting for the Society, field agents, debt recovery agents, tracing agents, letting agents, brokers, printers, market research agencies and providers of information technology services.
- If we sell or transfer all or part of our business, we may share or transfer our customer records as part of the proposed/actual sale or transfer. However, we will only do so under contract or where we have a legal obligation to do so. The protection, security and confidentiality of your personal information are important to us and we put in place appropriate safeguards to manage this.

YOUR RIGHTS UNDER THE DATA PROTECTION LAWS

You have the right to:

- Be informed about processing of your personal information.
- Have your personal information corrected if it is inaccurate or incomplete.
- Object to or restrict the processing of your personal information.
- Have your personal information erased subject to conditions (e.g. where the processing fails to satisfy legal requirements).
- Request access to your personal information also known as data portability.
- Challenge automated decision making including profiling, which is the automated processing of your personal information to evaluate certain things about you.
- Complain to the Information Commissioner's Office (<https://ico.org.uk/>) which enforces Data Protection laws.
- For more information on how we use your personal data and your rights, please see our Privacy Notice on our website at www.ybs.co.uk/privacy, where you can also view our Privacy Notice for Children and Young People. You can also request a copy of these notices in branch or by calling us on **0345 1 200 100**.
- Our Data Protection Officer (DPO) provides help and guidance to make sure we apply the best standards to protecting your personal information. Our DPO can be reached by email at dpo@ybs.co.uk or by post at DPO, Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ.

MANAGING OUR CONTACT WITH YOU

From time to time we would like to tell you about products and services that may be of benefit to you. These may be provided by us or other carefully selected organisations. To do this, we would like to communicate with you by post, face to face, email, text message, telephone or any other appropriate messaging service. Please tell us how you would like to be kept informed about our latest products and services: Please note: If you don't want to receive any of these messages, please tick the 'No contact' box.

1st Attorney/court appointee	Post	Phone	Email	(inc text and other messaging services)	No contact	2nd Attorney/court appointee	Post	Phone	Email	(inc text and other messaging services)	No contact
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I confirm I have also received a copy of the Financial Services Compensation Scheme (FSCS) Information Sheet and Exclusions List.

1ST ATTORNEY/COURT APPOINTEE SIGNATURE

Applications will not be accepted without a signature.

Signed

Date

2ND ATTORNEY/COURT APPOINTEE SIGNATURE

Applications will not be accepted without a signature.

Signed

Date

Our printed material is available in alternative formats e.g. large print, braille or audio. Please contact your local branch or call us on **0345 1200 100**.

Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Head Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ. All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard network rate as 01 or 02 landline numbers, even when calling from a mobile.