

Because you did not subscribe to your Kent Reliance ISA during the previous tax year, you are required to read and agree the following statements.

Please complete in Black Ink in BLOCK CAPITALS

First name

Surname

Date of birth / /

National Insurance number

Account number

Permanent residential address

Postcode

How we use your personal information

We collect and use your personal data in accordance with our privacy policy which can be found at kentreliance.co.uk/legal/privacy-policy or can be obtained by contacting our Head Office.

In Summary:

- We may collect various types of information about you. This includes information you give us, information we collect automatically when you use our banking services online, and information we receive from third parties such as credit reference agencies and fraud prevention agencies.
- We use information held about you in order to provide our services to you, to improve and market our services, and to comply with legal and regulatory requirements (for example, anti-money laundering obligations).
- Under applicable data protection law we may not process information about you unless we have a legal basis to do so. The legal bases on which we rely to process your personal data are:
 1. Processing of your data is necessary for the performance of a contract to which you are party to or to take steps at your request prior to entering into a contract;
 2. Processing of your data is necessary for compliance with a legal obligation which we are subject to;
 3. We have obtained your consent;
 4. Processing your data is necessary to protect your vital interests or the vital interests of another person; and
 5. Processing of your data is necessary for the purposes of the legitimate interests pursued by us or by a third party, except where such interests are outweighed by your interests, fundamental rights and freedoms.
- 6. We may share information about you with other members of the OneSavings Bank group of companies. We may also disclose your information to certain third parties such as suppliers, subcontractors, actual or potential business partners, credit reference agencies and fraud prevention agencies and other third parties we are legally required to share it with (e.g. our regulators).
- We typically store your information in the UK. In certain instances however your information may be transferred to jurisdictions outside of UK. If this is the case, we will take all steps reasonably necessary to ensure that your information is treated securely and in accordance with our privacy policy.
- We will retain your information for the period necessary to fulfil the purposes for which the information was collected. After that, we will delete it. The period will vary depending on the purposes for which the information was collected and if the information is subject to any specific legal or regulatory requirements.
- You may have some or all of the following rights in respect of information that we hold about you: (i) request us to give you access to it; (ii) request us to rectify it, update it, or erase it; (iii) request us to restrict our using it, in certain circumstances; (iv) object to our using it, in certain circumstances; (v) withdraw your consent to our using it; (vi) data portability, in certain circumstances; (vii) opt out from our using it for direct marketing; and (viii) lodge a complaint with the Information Commissioner's Office. You may contact us using the details on our website or by contacting our Data Protection Officer directly to exercise any of these rights.
- We use appropriate technical and organisational measures to protect your information and our online banking services are provided using secure servers.

We may update our privacy policy from time to time. Any changes we may make in the future will be posted on our website and we recommend that you revisit kentreliance.co.uk/legal/privacy-policy from time to time to stay informed about how we use your information.

Further support with managing your account

Do you require literature or information about your account in one of these alternative formats?

Applicant Large Font Braille Audio N/A

Do you require any additional support with managing your account or have your circumstances or needs changed? If you've already made us aware, there is no need to tell us again.

Please describe how we can help you and which account holder this relates to.

Would you like us to contact you to see what further support we can offer you?

Applicant Yes No

Please be aware, it may be necessary for us to contact you to clarify the support you've told us you need.

How would you like us to contact you?

Applicant Post Phone Secure message

Secure message will be available to you once you've registered for online services.

Alternatively, if you'd like to contact us please call us on **0345 122 1122** or visit your local branch.

Please note, by providing the above information and ticking this box, you consent to us using this information to assist you with the operation of your account. You can withdraw this consent at any time.

If you need any additional support managing your account, please contact us via phone, email or secure message (if you've registered for Online Services) or by visiting kentreliance.co.uk/additional-support for more information.

Declaration

- I apply to subscribe for a cash ISA for the tax year - and each subsequent year until further notice. (This does not commit you to paying every tax year.)
 - You are declaring that:
 - All subscriptions made, and to be made, belong to me;
 - I am 18 years of age or over;
 - I have not subscribed/made payments, and will not subscribe/make payments more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA, and a Lifetime ISA in the same tax year;
 - I have not subscribed, and will not subscribe, to another cash ISA in the same tax year that I subscribe to this cash ISA;
 - I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Kent Reliance if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties;
- I authorise Kent Reliance:
- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
 - To make on my behalf any claims to relief from tax in respect of ISA investments.
- I declare that this application form has been completed to the best of my knowledge and belief.
 - This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information.

Signed

(please keep signature within the box)

Date

/ /

Please send this form to: **OneSavings Bank, Sunderland, SR43 4AB.**



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