

## SAVINGS DECLARATION (if applicable)

### OFFSET DECLARATION

Accord Offset mortgages include a linked Offset savings account, which Accord will open for you with our parent company, Yorkshire Building Society (YBS). We do this because Accord doesn't provide savings accounts. Your savings will be held with YBS, but Accord will act as trustee. This simply means we hold the account for your benefit. The accounts are kept separate, so you'll always have access to your savings.

I declare that my interest in the Accord Offset savings account will not be held by me as trustee or nominee for a company or other corporate body or for persons who include a company or other corporate body. I will be subject to the T&Cs of the account which are Accord Offset Terms. I have a copy of these. Each person who signs makes this declaration.

I agree to the processing of my personal information as explained in the YBS Privacy Notice found at [www.ybs.co.uk/privacy](http://www.ybs.co.uk/privacy)

I agree to the Society disclosing details of this Offset Savings account to all borrowers and guarantors (if any) of an Accord Offset Mortgage account linked to this account.

### FSCS INFORMATION SHEET ACKNOWLEDGMENT

I acknowledge receipt of the FSCS information sheet

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### INTERNATIONAL TAX COMPLIANCE DECLARATION

#### 1ST APPLICANT DETAILS

Are you a US Citizen? YES ☐ NO ☐

If you are a US Citizen, you must provide your US Tax Identification Number:

Are you a resident of any country other than the UK for tax purposes? YES ☐ NO ☐

If you have indicated above that you are a resident of any country other than the UK for tax purposes, please complete the relevant information below, otherwise please leave blank:

Non-UK Tax Residency:

Associated Tax Identification Number:

Non-UK Tax Residency:

Associated Tax Identification Number:

#### 2ND APPLICANT DETAILS

Are you a US Citizen? YES ☐ NO ☐

If you are a US Citizen, you must provide your US Tax Identification Number:

Are you a resident of any country other than the UK for tax purposes? YES ☐ NO ☐

If you have indicated above that you are a resident of any country other than the UK for tax purposes, please complete the relevant information below, otherwise please leave blank:

Non-UK Tax Residency:

Associated Tax Identification Number:

Non-UK Tax Residency:

Associated Tax Identification Number:

#### OTHER INFORMATION REQUIRED

Employment status

Occupation

Source of deposit

What are you saving for?

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**SIGNATURE**  
**(ALL APPLICANTS MUST SIGN - APPLICATIONS WILL**  
**NOT BE ACCEPTED WITHOUT ALL SIGNATURE(S))**

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Date:

Date:

## DECLARATION

I certify that to the best of my knowledge the information provided in this form is accurate and complete, and that I will tell the Society if any of the information changes.

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The below section is in relation to your Accord mortgage. To ensure we are setting up customers that have chosen the "static payment" option accurately we would like to validate the total monthly mortgage payment amount. Please review and complete the below if applicable:

Accord Mortgage offers three payment options as part of its offset product proposition. You will have discussed and chosen an option with your Broker.

- Option One (Net payment): "Reduce current mortgage repayments"
- Option Two (Gross payment): "Reduce future mortgage repayments"
- Option Three (Static payment): "Pay the mortgage off sooner"

If you have chosen option one or two then no further information or action is required.

If option three (Static payment) has been chosen, you have decided to overpay a fixed amount each month please confirm your total mortgage payment amount, not the additional amount you would like to pay:

£ \_\_\_\_\_ \*Only to be completed on the Static option.

If you are unsure of any of the above information, please ensure you validate this with your broker.

Our printed material is available in alternative formats e.g. large print, braille or audio. Please call us on **0345 1200 872**

Accord Mortgages Limited is authorised and regulated by the Financial Conduct Authority. Accord Mortgages Limited is entered in the Financial Services Register under registration number 305936. Accord Mortgages Limited is registered in England No. 2139881. Registered Office: Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ. Accord Mortgages is a registered Trade Mark of Accord Mortgages Limited.

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.

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. Calls to 0800 numbers are free of charge from a landline or mobile.