

- For attorneys or court-appointed representatives registering to manage an account, this form must be submitted along with the relevant Power of Attorney or Court of Protection document.
- This form is for professional bodies and non-professional attorneys.
- Please complete, sign and return the form to: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ.

SECTION 1 ATTORNEY(S)/COURT APPOINTEE(S) DETAILS
PART A

Attorneys acting in a professional capacity (for example, solicitors) only need to complete **Section 1, Part A** before continuing to **Section 2**.

Non-professional attorneys must complete **Section 1, Parts A and B** before continuing to **Section 2**.

1ST ATTORNEY/COURT APPOINTEE	2ND ATTORNEY/COURT APPOINTEE
Title and surname	Title and surname
Forenames in full	Forenames in full
Date of birth	Date of birth
National insurance number	National insurance number
Full address (including postcode)	Full address (including postcode)
Number of years and months at address	Number of years and months at address
Previous address including postcode (if you've lived at your current address for less than 3 years)	Previous address including postcode (if you've lived at your current address for less than 3 years)
Email	Email
Phone number (mobile / home)	Phone number (mobile / home)
Nationality	Nationality

PART B

The following questions give us a clearer picture of how you intend to use the account, and also help us meet our regulatory obligations. please provide accurate information so there's no delay in processing your application.

As an attorney, do you intend on depositing funds from your own personal account(s) into any of the donor's accounts?	Yes ☐	No ☐	As an attorney, do you intend on depositing funds from your own personal account(s) into any of the donor's accounts?	Yes ☐	No ☐
Will any of the money going into this account come from outside the UK?	☐	☐	Will any of the money going into this account come from outside the UK?	☐	☐
If "Yes", please list the countries it will come from.			If "Yes", please list the countries it will come from.		
Do you have any additional nationalities or citizenships?	☐	☐	Do you have any additional nationalities or citizenships?	☐	☐
If "Yes", please list them ALL here.			If "Yes", please list them ALL here.		

If you answered "Yes" to **any** of the above questions, please now answer the questions below.

If you answered "No" to **all** the above questions, please continue onto page 2 and complete **Section 2**.

How much in total are you expecting to deposit on behalf of the account holder(s) over the next 12 months?	£	How much in total are you expecting to deposit on behalf of the account holder(s) over the next 12 months?	£
Source of deposit		Source of deposit	
What's the account holder saving for?		What's the account holder saving for?	
Your employment status		Your employment status	
Your occupation		Your occupation	
Employment industry		Employment industry	
Your annual income before tax (N/A if retired/student/homemaker or unemployed)	£	Your annual income before tax (N/A if retired/student/homemaker or unemployed)	£
Which country were you born in?		Which country were you born in?	

Please make sure all the information has been provided correctly. If you're unsure, 'Additional Information' on page 3 can help.

FOR SOCIETY USE ONLY													
Account number				Branch/agency code				Date account opened					

SECTION 2 ACCOUNT HOLDER'S DETAILS															
Account holder's name								Account holder's date of birth							
Has the account holder lost mental capacity?				Yes ☐		No ☐		Has the account holder lost physical capacity and is unable to sign?				Yes ☐		No ☐	
If the account holder is experiencing a loss of physical capacity or requires any additional support, please let us know what support they require to effectively manage their account/s.															

SECTION 3 LPA ACCESS CODE														
V	—					—					—			

SECTION 4 AS ATTORNEY/COURT APPOINTEE													
I/We wish to be registered (where possible) to all existing accounts (please tick to confirm)				☐		OR		I/We wish to be registered to the following existing accounts only :					
Change of address for the account holder (if applicable)													

SECTION 5 MANAGING OUR CONTACT WITH YOU													
From time to time we'd 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'd 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'd like to be kept informed about our latest products and services. If you don't want to receive any of these messages , please tick the 'No contact' box.													
1st Attorney/court appointee		Post				Phone				Email (including text and other messaging services)		No Contact ☐	
2nd Attorney/court appointee		Post				Phone				Email (including text and other messaging services)		No Contact ☐	
I confirm I have also received a copy of the Financial Services Compensation Scheme (FSCS) Information Sheet and Exclusions List.													

SECTION 6 DECLARATION													
I/we declare that:													
1. I am/we are the lawful attorney(s) appointed under the Power of Attorney named above, and that the Power of Attorney is valid, in force, and has not been revoked.													
2. If required, the Power of Attorney has been registered with the Office of the Public Guardian.													
3. I/we will use the account only for the donor's benefit and in accordance with the powers granted to me/us under the Power of Attorney.													
4. I/we will keep the donor's money separate from my/our own and maintain proper records of transactions carried out on their behalf.													
5. I/we will inform the Society promptly if:													
☐ the Power of Attorney is revoked or otherwise comes to an end; ☐ the donor dies; or ☐ I/we become aware of any circumstances affecting my/our ability to act as attorney.													
6. I/we understand that the Society may rely on this declaration when allowing me/us to operate the donor's account.													
1ST ATTORNEY/COURT APPOINTEE SIGNATURE Applications will not be accepted without a signature.							2ND ATTORNEY/COURT APPOINTEE SIGNATURE Applications will not be accepted without a signature.						
Signed							Signed						
Date							Date						

The information on this sheet is here to help you fill out your application form. Where possible, we've aligned it with the sections on your application form. If you're unsure about anything, please get in touch and we'll do our best to help.

EMPLOYMENT AND SAVINGS DETAILS

Please select the fields which best match your personal details

SOURCE OF DEPOSIT

- | | | | |
|--|--|---|---|
| <ul style="list-style-type: none"> • Dividends or company profits • Existing savings • Funds from other individuals • Gift(s) • Inheritance | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • Life insurance policy payout • Sale of property, including buy-to-let • Funds from partner/spouse • Savings from salary/income | <ul style="list-style-type: none"> • State benefits • Student finance • Virtual money e.g. cryptocurrency • Not contributing (joint customers only) |
|--|--|---|---|

WHAT ARE YOU SAVING FOR?

- | | | |
|--|--|--|
| <ul style="list-style-type: none"> • General savings • Pay bills • House purchase | <ul style="list-style-type: none"> • Care home fees • Special occasion (e.g. wedding) • Holiday | <ul style="list-style-type: none"> • Car • Retirement • Further education |
|--|--|--|

EMPLOYMENT STATUS

- | | | |
|--|--|--|
| <ul style="list-style-type: none"> • Employed • Self-employed partner • Self-employed sole trader | <ul style="list-style-type: none"> • Director or Shareholder (less than 25% shares) • Director or Shareholder (greater than or equal to 25% shares) • Retired | <ul style="list-style-type: none"> • Homemaker • Student • Not employed • Minor - under 16 |
|--|--|--|

OCCUPATION

- | | | | | |
|---|--|--|--|---|
| <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • Manual worker • Market trader • Marketing professional • Mechanic • Metal worker • Midwife • Model • Musician • Nurse • Nursing assistant • Occupational therapist • Office manager • Optician • Painter • Paramedic • Personal assistant • Pest control officer • Pharmacist • Plumber • Police force • Political / diplomat • Postal worker • Probation officer • Production manager • Professor • Project manager • Property developer • Psychologist • Public relations person • Publican • Receptionist | <ul style="list-style-type: none"> • Roofer • Sales manager • Scientist • Secretary • Security guard • Shop assistant • Social worker • Software engineer • Solicitor • Speech therapist • Sports professional • Sports trainer • 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

- | | | |
|---|--|--|
| <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 |
|---|--|--|

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 share 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.

HOW WE USE YOUR PERSONAL INFORMATION FOR POWER OF ATTORNEY

- References to 'We' 'Our' 'Us' and 'the Society' in this section are to Yorkshire Building Society trading as Yorkshire Building Society, and Chelsea Building Society and The Chelsea.
- 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.

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 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 or restrict to 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 thechelsea.co.uk/privacy/index.html, where can also view our privacy notice for Children and Young People. You can also request a copy of these notices by calling us on **0345 166 9300**.
- 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.

Our printed material is available in alternative formats e.g. large print, braille or audio. Please call us on **0345 744 6622**.

Chelsea Building Society and the Chelsea are trading names of Yorkshire Building Society. 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. Principal 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.