



# Application to add a Third Party Mandate

**This form can be completed electronically, Saved and printed.  
If completing manually, please complete in black ink and BLOCK CAPITALS. Complete all boxes that apply.**

## 1. Personal Details

### Existing Account holder 1 details

Surname

Title  Mr  Mrs  Miss  Ms  Other

Forename(s) in full

Home telephone

Mobile Number

Email address

Permanent Residential Address   
Postcode

Date of birth

### 2nd Account Holder (Only to be completed for joint accounts)

Surname

Title  Mr  Mrs  Miss  Ms  Other

Forename(s) in full

Home telephone

Mobile Number

Email address

Permanent Residential Address   
Postcode

Date of birth

## 2. Keeping You Up To Date About Our Products and Services

From time-to-time Chorley Building Society would like to provide you with information on our products and services, offers and promotions which we believe may be of interest to you. Please tick the boxes to tell us all the ways you would prefer to hear from us:

**Existing Account Holder 1**    Email     Text Message     Phone     Post     I do not wish to receive any marketing communications

**Existing Account Holder 2**    Email     Text Message     Phone     Post     I do not wish to receive any marketing communications

*You can opt out of marketing or change your preferences at any time by following the instructions in each communication. For more information, please refer to our privacy policy.*

## 3. Current employment status

### Existing Account Holder 1

Employed     Self employed     Retired     Student     Homemaker     Unemployed     Other

Occupation

Annual Income  £0 - £24,999     £25,000 - £49,999     £50,000 - £74,999  
 £75,000 - £149,999     £150,000 - £299,999     £300,000 +

### Existing Account Holder 2

Employed     Self employed     Retired     Student     Homemaker     Unemployed     Other

Occupation

Annual Income  £0 - £24,999     £25,000 - £49,999     £50,000 - £74,999  
 £75,000 - £149,999     £150,000 - £299,999     £300,000 +

## 4a. What type of third party are you applying for?

Savers Account Operator     Young Savers Account Operator     CTF / JISA Registered Contact

Refer to the Third Party Mandate Explained document which can be found on our website or requested in branch.

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**Accounts to which third party is to be added**

Account Name

Account Number

Account Name

Second account number (if applicable)

Account Name

Third account number (if applicable)

Account Name

Fourth account number (if applicable)

**4b. Third Party details**

Title  Mr  Mrs  Miss  Ms  
 Other

Address   
Postcode

Forename/s in full   
Surname

Relationship to account holder

Date of birth

Signature of third party

Telephone

Date

Email address

The proposed Third Party Mandate holder should return this form to Chorley Building Society together with the required forms of identification. Please refer to the Society's Identification Criteria which is available in branch or at [www.chorleybs.co.uk](http://www.chorleybs.co.uk)

I/We hereby authorise and request Chorley Building Society to permit the person detailed in section 4B of this form to operate my/ our accounts (as listed above). I/We understand that a person with a Third Party Mandate has the authorisation to be given information regarding the account(s) I/We further understand that the Third Party Mandate holder's signature shall be a complete and binding discharge and I/we agree that this authority shall remain in force until receipt of your acknowledgement of any notice of revocation given by me/us.

**Account holders to sign:**

Account Holder 1

Account Holder 2

Date

Date

**Your Personal Information and what we do with it**

Chorley and District Building Society is the Data Controller of any personal data you supply. The information you provide, we obtain through our dealings with you or about your account will be held on the Society's computers and in other records. We may use and share your personal information to help us provide the services you are applying for and to conduct an electronic search on you via the services of external agencies in order to confirm your identity and comply with money laundering regulations. Under relevant data protection laws, you have a number of rights including the right to see and receive a copy of information held about you on our records and to ask for any inaccurate details to be corrected. For more details of how we will use and share your personal information, and about your rights, please read our Privacy Notice on our website at [www.chorleybs.co.uk/privacy](http://www.chorleybs.co.uk/privacy)

If you have any questions about the relevant data protection laws or your rights under them, please write to the Data Protection Officer, Chorley Building Society, Key House, Foxhole Road, Chorley, Lancashire PR7 1NZ or by email to [DPO@chorleybs.co.uk](mailto:DPO@chorleybs.co.uk)

**STAFF USE ONLY**

Customer Advisor

Customer Number of Account Holder  Customer Number of third party

Scanned to N Drive  Yes  No

QA check completed by

Add\_3rdParty\_mandate\_v3\_0724