

Triodos Bank.

Personal Savings: Change of account type request.

Important Information

This form enables you to change an existing Triodos savings account to a different type of Triodos savings account whilst keeping the same account number.

If you're applying to change an existing joint account, please ensure you fill in all details for both applicants.

It is not possible to use this form to change an existing joint account into a sole account, or an existing sole account into a joint account. Please contact us if you wish to do this.

This form should be completed either by printing a blank copy and filling in the required fields, or by filling in the fields online and then printing the form.

The declaration at the end of this form must be signed and dated by the account holder(s) and then the completed form should be returned to us at our Freepost address.

Our Freepost address is Royal Mail registered and simple to use. Write it exactly as shown below on your envelope and your letter will get to us free of charge (no stamp required):

Freepost TRIODOS BANK

Section 1: Savings account change details

Your Triodos savings account number (the account you wish to change)

What type of Triodos savings account do you want to change it to? This can't be the same as the savings account above.

Triodos Online Saver

Triodos Online Saver Plus

Triodos Regular Saver 33 days' notice

Triodos Regular Saver 90 days' notice

Triodos Saver 33 days' notice

Triodos Saver 90 days' notice

Triodos Saver 1 year's notice

Changes to a different type of savings account are not permitted from Triodos Ethical Savings Bonds, Triodos Right Start Saver, Triodos Fixed Regular Saver, Triodos ISAs, Community Investor, High Interest Cheque Account, Personal Savings Account, Social Investor Cheque Accounts and SIPP Deposit Accounts.

Section 2: Your details

First applicant

Full name (including title)

Permanent residential address

Postcode

Date of birth

/ /

Email*

(*if you are happy to be contacted by email in the future) Please note you cannot change to an online account without providing an email address

Second applicant

Full name (including title)

Permanent residential address

Postcode

Date of birth

/ /

Email*

(*if you are happy to be contacted by email in the future) Please note you cannot change to an online account without providing an email address

Section 3: Nominated account

If you have already provided us with a valid nominated account for your existing savings account do not fill in this section and go straight to Section 4.

If you want to transfer money from your savings account online, you must do so to another Triodos account or a nominated account.

Sole account

If your existing savings account is a sole account, the nominated account must be another of your Triodos accounts or a sterling account in your sole name held with another UK bank or building society.

Bank name and address

Postcode

Account holder's name (max 18 characters)

Sort code

- -

Account number

Joint account

If your existing savings account is a joint account you may choose up to three nominated accounts – a joint account which is either a Triodos account in both your names or a joint sterling account held with another UK bank or building society, and one sole account each which is either a Triodos account or a sterling account held with another UK bank or building society.

Joint nominated account (in both applicants' names)

Bank name and address

Postcode

Account holder's name (max 18 characters)

Sort code

- -

Account number

Sole nominated account (in first applicant's name)

Bank name and address

Postcode

Telephone: 0330 355 0355
contact@triodos.co.uk
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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Account holder's name (max 18 characters)

Sort code

- -

Account number

Sole nominated account (in second applicant's name)

Bank name and address

Postcode

Account holder's name (max 18 characters)

Sort code

- -

Account number

Section 4: Declaration

I/We apply to change my/our Triodos savings account as indicated above.

I/We confirm that I/we have read and accepted the relevant account Terms and Conditions and Triodos Bank's General Terms and Conditions.

I/We confirm that I/we have read the relevant Summary Box and the FSCS Information Sheet.

I/We acknowledge your right to delay changing my account and suspend operations on this account until satisfactory details about my/our identification have been supplied.

I/We declare that this application form has been completed to the best of my/our knowledge and belief.

Signature – First applicant

Signed

[Signature box for first applicant]

Date

/ /

Signature – Second applicant

Signed

[Signature box for second applicant]

Date

/ /