

Registration of power of attorney / court of protection deputyship order



Useful information to support you in completing this form

Use this form to register a power of attorney, deputyship or guardianship order with Newcastle Building Society savings and mortgage accounts. We will register the document against all savings and mortgage accounts held by the donor. We can only register a lasting power of attorney for **property and financial affairs**.

Please let us know if you have any investments or holdings with Newcastle Financial Advisers Limited.

Throughout this form where ever we refer to 'attorney' this includes court of protection deputy or guardian. Attorney(s)/court appointees will not become account holder(s) and will only be able to operate account(s) in accordance with the power of attorney, deputyship or guardianship order.

Accessibility and wellbeing

At Newcastle Building Society, we want to help you get the most out of your interactions with us.

Letting us know what we can do differently to make things easier, gives us the tools we need to help you. For example, you might need us to provide things in a different format such as large print. Or perhaps you find social interactions difficult and want us to be aware of this.

Whatever it is, tell us so that we can make things as easy as possible for you.

You can provide this information alongside this form. Alternatively, you can call us on **0345 734 4345**, our lines are open Monday to Friday 8am to 6pm. Or you can visit us in branch or write to us using the address noted below, in step 3.

Online savings accounts

If savings account access is given to an attorney, they may have full access. This allows them to make amendments such as changing the correspondence address, making withdrawals and closing your account(s). If you have any concerns with this, you can contact us using the details at the bottom of this page.

Step 1 – Completing the form

Please complete this form in BLOCK CAPITALS. For joint accounts, a separate form must be completed for each account holder/ donor. The form must be signed by the attorney(s) and the donor, if they have mental capacity. There is a declaration that all attorneys must read and agree to when signing the form and this refers to our Terms and Conditions. These can be found on our website or if you would like a paper copy call us or visit us in branch. Just let us know if you need these for Mortgages, Savings or both.

Step 2 – What documents do we need?

If you are registering a power of attorney document with us, please provide either the original or a certified copy of the full document.

If you have a deputyship or guardianship order, please provide us with the **original** document. We cannot accept certified copies.

Copies of power of attorney documents can be certified by the donor, a solicitor or a notary public.

Lasting power of attorney (LPA) access codes

If you are registering an LPA with us, you can provide us with an LPA access code instead of sending us the paper version.

You can create the code by visiting the government website:

www.gov.uk/use-lasting-power-attorney/start-lasting-power-of-attorney

The code is valid for 30 days from the day you create it.

Please note: In some cases, the information we need is not always available using the access code and we may still need to see the full LPA document. If this is the case, we will get in touch.

You do not need to send us any identification documents at this stage. We will use our electronic verification system to verify the identity of any attorneys, deputies or guardians that are to be registered. Please note, this may not always be successful and we may still need to contact you for additional identification.

Step 3 – Returning the form to us

You can return this to us by post or return the completed form to one of our branches.

Return by post

Newcastle Building Society,
1 Cobalt Park Way,
Wallsend,
NE28 9EJ.

Visit a branch

Find your local branch
at newcastle.co.uk/our-branches
or calling 0345 734 4345

Step 4 – What happens next

We will write to your selected correspondence address to let you know the registration is complete.

Newcastle Building Society introduces to Newcastle Financial Advisers Limited for advice on investments, pensions, life and protection insurance, and inheritance tax planning. Newcastle Financial Advisers Limited is an appointed representative of The Openwork Partnership a trading style of Openwork Limited which is authorised and regulated by the Financial Conduct Authority.

continued overleaf

Section 3 – Attorney/deputy details

If you are completing this form as a professional attorney (e.g. solicitor) please provide your business address.

Attorney/Deputy 1

Title	Mr/Ms/Mrs/Miss/Other	<input type="text"/>
Please enter all forenames	<input type="text"/>	
Surname	<input type="text"/>	
Address (including postcode)	<input type="text"/>	
Country	<input type="text"/>	
Telephone number	<input type="text"/>	
Mothers maiden name	<input type="text"/>	
Email address	<input type="text"/>	
Date of birth	<input type="text"/>	
Nationality	<input type="text"/>	

Attorney/Deputy 2

Mr/Ms/Mrs/Miss/Other	<input type="text"/>
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	

If you are an existing member of Newcastle Building Society, please provide one of your account numbers. This will help us to identify you on our systems.

Savings/mortgage account number or customer number	<input type="text"/>
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<input type="text"/>

Attorney/Deputy 3

Title	Mr/Ms/Mrs/Miss/Other	<input type="text"/>
Please enter all forenames	<input type="text"/>	
Surname	<input type="text"/>	
Address (including postcode)	<input type="text"/>	
Country	<input type="text"/>	
Telephone number	<input type="text"/>	
Mothers maiden name	<input type="text"/>	
Email address	<input type="text"/>	
Date of birth	<input type="text"/>	
Nationality	<input type="text"/>	

Attorney/Deputy 4

Mr/Ms/Mrs/Miss/Other	<input type="text"/>
<input type="text"/>	
<input type="text"/>	
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If you are an existing member of Newcastle Building Society, please provide one of your account numbers. This will help us to identify you on our systems.

Savings/mortgage account number or customer number	<input type="text"/>
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<input type="text"/>

Section 4 – Mental capacity declaration

Does the donor have the mental capacity to manage their own financial affairs?

Please note we must comply with any restrictions or instructions within the power or order. You may wish to seek legal or medical advice for enduring, lasting or continuing powers of attorney. **Please tick ONE of the options below:**

The account holder has the mental capacity to manage their own financial affairs

The account holder **does not** have the mental capacity to manage their own financial affairs

If there are any future changes in the donor's mental capacity status, it is the attorney's responsibility to inform us as soon as possible.

Section 5 – Correspondence address

We can only send correspondence to one address, please tell us where you would like correspondence to be sent by selecting one of the below options:

The account holder (donor)

Attorney 1

Attorney 2

Attorney 3

Attorney 4

Please note the address details may appear on statements that are available to any joint account holder or other party, such as attorneys, associated with the account(s).

Online savings accounts

Note, if savings account access is given to an attorney, they may have full access. This allows them to make amendments such as changing the correspondence address, making withdrawals and closing the account.

Please note: All electronic withdrawals must be sent to a nominated bank account in the donors name.

Section 6 – Declaration and indemnity

I/We understand and agree that I/we have a duty to act in accordance with the power of attorney/court of protection order and the principals of the Mental Capacity Act 2005 and Mental Capacity Code of Practice. As the appointed attorney(s)/deputy(s) for the account holder named in Section A of this form, I/each of us agree:

- That I am not bankrupt.
- To tell the Society if bankruptcy proceedings are taken against me.
- To act on the accounts according to the terms of the power of attorney/court of protection order I am registering.
- To tell the Society if I or the account holder changes address.
- To repay the Society for any costs incurred by directly following my instructions.
- To follow the terms and conditions of the accounts. Our general terms and conditions can be found on our website, for product specific terms and conditions please contact us.
- To notify the Society if the status of the donor's mental capacity changes.

Attorney 1 signature

Signature of first named attorney

PLEASE SIGN WITHIN THIS BOX WITH A PEN

Date (please write INSIDE the boxes)

		-			-				
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Attorney 3 signature

Signature of third named attorney

PLEASE SIGN WITHIN THIS BOX WITH A PEN

Date (please write INSIDE the boxes)

		-			-				
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Attorney 2 signature

Signature of second named attorney

PLEASE SIGN WITHIN THIS BOX WITH A PEN

Date (please write INSIDE the boxes)

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Attorney 4 signature

Signature of fourth named attorney

PLEASE SIGN WITHIN THIS BOX WITH A PEN

Date (please write INSIDE the boxes)

		-			-				
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Where the account holder/donor has mental capacity we require their signature confirming their consent to the power of attorney being registered against their account(s) and the attorney(s) acting for them:

I consent to my attorney(s) being registered against my account(s) and acting for me. I understand that where my account(s) is/are online account(s) my attorney(s) may have free and full access.

Account holder/donor signature

Signature of account holder/donor

Date (please write INSIDE the boxes)

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PLEASE SIGN WITHIN THIS BOX WITH A PEN

Proof of identity and residency

To comply with anti-money laundering regulations, all donors and attorneys who enter into a relationship with the Society must prove their identity and residency. The preferred method is via an electronic authentication system. This will match personal details against a range of publicly available records and credit records. Details of credit histories will not be made available to us and, although the data provider may log the search, it will not be used for future credit assessment purposes. There are many reasons why a match may not be obtained, for example if you have recently moved house, have little or no credit etc. In these situations, documentary evidence may need to be requested.

Use of your personal information

The Newcastle Building Society respects your privacy rights and takes its data protection obligations very seriously. Our privacy notice sets out how we use your personal data and how we support your rights under data protection law in the UK. Any personal data that we hold about you will be stored and held securely by us.

We collect your personal data when you apply for one of our products, request a service, when you visit our website/app, or communicate with us. Our privacy notice applies to personal data which is supplied by you to us by any means whether via our website, by telephone, by email or letter, or face-to-face with our branch staff. It also applies to your personal data that we receive from others, such as your mortgage intermediary, financial advisers, credit reference agencies, or any joint account holders.



It is important that you revisit our privacy notice regularly, as we may change the content to reflect how we deliver our products and services. A full copy of our privacy notice can be found at www.newcastle.co.uk/legal-information/customer-privacy-policy or by scanning the QR code outlined.

Office use only

Branch name: ID/Res received ID3 Score

	Attorney 1	Attorney 2	Attorney 3	Attorney 4
Profile No.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Active/Inactive	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>