

Registration of Power of Attorney / Court of Protection Deputyship Order



Important Information

- Use this form to add a Power of Attorney/ Court of Protection Deputyship to your Newcastle Building Society account(s). Attorney(s)/ Deputy(s) will not become account holder(s) and will only be able to operate account(s) in accordance with the Power of Attorney/ Court of Protection Order. A separate form must be completed for each account holder.
- For online accounts, please be aware that once added the attorney will have full access to make transactions, make amendments such as changing the address and close the account.
- Please enter details in the appropriate space below in BLOCK CAPITALS and return this form to us at Investment Services, Newcastle Building Society, 1 Cobalt Park Way, Wallsend, NE28 9EJ. Any Power of Attorney added who is not an existing account holder with Newcastle Building Society will need to provide two documents proving their residency and identity.
- Existing account holders do not need to send any proof of identity or residency. However, some customers who have had long standing business relationships may not have produced satisfactory documentation and if this is the case the process for new customers must be adopted. For further guidance please contact your local branch or call 0345 734 4345 (lines open 8am-6pm Monday – Friday).
- Where the Power of Attorney or Court of Protection Deputyship Order is a paper document you must supply the original document or a certified copy in its entirety. If any pages are missing the document will not be valid and the Society will be unable to accept it.

Section A - Account Holder / Donor's Details

Account Number

(Please mark X in the box that applies to you or state your title) Title Mr Mrs Miss Other

Please enter ALL forenames

Surname

Permanent Residential Address

Property Number and/or Property name

Street

Town Postcode

Date of Birth

Nominated Bank Account Details Account Holder's Name

The nominated account must be a UK current account in the donor's name Address

donor's name

Bank Sort Code 8 Digit Account Number

To confirm the nominated account is in the donor's name, we will require a bank statement for the account. The bank statement must:

- Show the full name of the donor (first name and last name) ■ Show the sort code and account number
- Be dated within the last 3 months ■ Show activity during this period
- Not have a zero balance or be a closed account

Please confirm the type of Power of Attorney (EPA) Ordinary/ General Power of Attorney (OPA)

(The Power of Attorney must also be registered against the nominated bank account) Court of Protection Deputyship Order (COP) Lasting Power of Attorney for Property and Financial Affairs (LPA)

If you have a digital LPA please provide the secure LPA access code from the Office of the Public Guardian:

If you have an online account, or would like to convert your passbook account to online operation please confirm:

Email address

Mother's maiden name

(Please note, if you convert your passbook account to online operation you will no longer be able to transact in branch):

Mental capacity

Does the Account Holder / Donor have mental capacity? Yes No

Section B - Attorney / Deputy Details

Professional Attorney (e.g. Solicitor) for contact/correspondence complete title, forenames, surname, BUSINESS address, contact telephone number, DOB & Nationality.

Attorney / Deputy for contact/correspondence complete title, forenames, surname, PERMANENT residential address, contact telephone number, DOB & Nationality. Please tell us the details for ONE of your Newcastle Building Society accounts, if you have one. This will help us identify you on our systems.

Attorney 1 / Deputy 1

Attorney's/Deputy's Newcastle Building Society Account

(Please mark X in the box that applies to you or state your title) Title Mr Mrs Miss Other

Please enter ALL forenames

Surname

Permanent/Business Address

Property Number and/or Property name

Street

Town Postcode

Contact telephone number

Email address

Date of Birth

Nationality
(Required for regulatory reasons)

Attorney 2 / Deputy 2

Attorney's/Deputy's Newcastle Building Society Account

(Please mark X in the box that applies to you or state your title) Title Mr Mrs Miss Other

Please enter ALL forenames

Surname

Permanent/Business Address

Property Number and/or Property name

Street

Town Postcode

Contact telephone number

Email address

Date of Birth

Nationality
(Required for regulatory reasons)

