

## SUMMARY BOX - Key Product Information

Account name	Regular Saver Cash ISA	
<p><b>What is the interest rate?</b></p>	<p>Interest rate without bonus (where one or more conditions are not met<sup>***</sup>)</p>	<p><b>2.40%</b> Gross * / AER **</p>
	<p>Interest rate with bonus (includes a bonus of <b>0.70%</b> where all conditions are met<sup>***</sup>)</p>	<p><b>3.10%</b> Gross * / AER **</p>
<p><b>Can Beverley Building Society change the interest rate?</b></p>	<p><b>Yes</b>, We may change the variable interest rate in the circumstances set out in our terms and conditions. If we reduce the rate, we will give you notice in line with those terms. Refer to our General Savings Terms and Conditions and the Framework Contract for Payment Services for full details.</p>	
<p><b>What would the estimated balance be after 10 months based on depositing £20 &amp; £2,000 every calendar month?</b></p>	<p><b>£202.21</b> This figure is for illustration purposes and assumes a further 9 payments of £20 (minimum monthly amount) and therefore includes the bonus rate, no withdrawals and no interest rate changes.</p>	<p><b>3.10%</b> Gross* / AER**</p>
	<p><b>£20,281.01</b> This figure is for illustration purposes and assumes a further 9 payments of £2,000 (maximum monthly amount) and therefore includes the bonus rate, no withdrawals and no interest rate changes.</p>	<p><b>3.10%</b> Gross* / AER**</p>
<p><b>How do I open and manage my account?</b></p>	<p>To open this Cash ISA, you must be over 18 and resident in the UK for tax purposes The minimum opening balance is <b>£20</b> and maximum is <b>£2,000</b>. In March, you can pay in additional funds up to your remaining ISA allowance for the tax year. The maximum annual subscription limit for the 2026/27 Tax Year is <b>£20,000</b> as set annually by HM Revenue and Customs. One account per member.</p> <p><b>How to open the account</b> You complete the registration through our online banking platform. Pass an Electronic Identification check. Send us at least £20 by bank transfer.</p> <p><b>Managing your account</b> Each month the account must receive one payment of £20-£2,000 to be eligible for the Conditional Bonus. This account can only be managed through our online banking platform. Please contact us if you need assistance from us or someone else.</p>	
<p><b>Can I withdraw money?</b></p>	<p><b>Yes</b>, however to be able to receive the bonus no withdrawals are permitted before the maturity date of 31st March. You can transfer this Cash ISA to another provider before 31st March but you will lose the bonus. All Faster Payments must be made to the nominated bank account linked to the account. Refer to our General Savings Terms and Conditions and the Framework Contract for Payment Services for more information on withdrawals.</p>	
<p><b>Additional information</b></p>	<p>* Gross rate - the contractual rate of interest to be paid on a savings account without any deduction being made in respect of potential tax liability. ** AER - stands for Annual Equivalent Rate and illustrates what the interest rate would be if interest was paid and compounded once each year.</p>	

# Regular Saver Cash ISA

## General Information

### Terms & Conditions

Please read the General Savings Terms and Conditions and the Framework Contract for Payment Services before opening any account.

### Income Tax

Tax treatment depends on the individual circumstances of each customer and may be subject to change in the future by HM Revenue & Customs.

The Society is required to supply HM Revenue & Customs with particulars of certain interest paid or credited to savers. Please contact the Society for details of current taxation arrangements or direct enquiries to [www.gov.uk/apply-tax-free-interest-on-savings/](http://www.gov.uk/apply-tax-free-interest-on-savings/)

### Penalties

All interest penalties are deducted from accrued interest on the account. Should there be insufficient accrued interest to deal with the above (i.e. at the beginning of each year) the penalty will be deducted from the capital balance.

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Member of the Building Societies Association.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered Number: 206064

The Society reserves the right to vary, improve or withdraw any of the benefits or services contained within this leaflet.

**Rates correct from 03/06/2026.**