

Moving your account to the Coventry



Switching your account to the Coventry

Switching your account is a big decision that's why at Coventry Building Society we aim to make it as simple and easy as possible.

People often worry about moving their Direct Debits, standing orders and regular credits in case something goes wrong. But as we do everything for you, there's really no need to worry.

Hopefully, this leaflet should answer any questions you may have about the process of moving your account to the Coventry. Once you've read through everything, if you're still not sure, or if you want help completing any of the forms, simply call into any branch or agency, or phone our Customer Service Centre on 0800 121 8899 – our staff will be happy to help.

What type of accounts can I move my existing payments to at the Coventry?

If you have a MoneyManager, an existing MoneyManager (Coventry First) or an Offset Savings account you can move your existing payments to one of these.

If you don't already have one of these accounts but would like to move your account to the Coventry, you'll need to open a MoneyManager account (Offset Savings accounts are only available if you have an Offset Mortgage with us, and MoneyManager (Coventry First) accounts are no longer available to new customers).

You can open an account:

- At any branch or agency
 - By going online at [thecoventry.co.uk](https://www.thecoventry.co.uk)
 - Calling us on 0800 121 8899
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Where can I get a 'switching form' and who do I return it to?

You can get a form from:

- Any branch or agency
- By calling us on 0800 121 8899
- Going online at thecoventry.co.uk

Once you've completed the form, simply return it to any branch or agency or you can post it to us at:

Account Switching Team, Oakfield House, Binley Business Park,
Coventry, CV3 2TQ.

What is the 'switching' form and why do I need to complete it?

Once completed, this form provides us with all the information we need to go ahead and contact your existing provider and proceed with your switching request. It's your authority to move your payments to us.

You choose the date you want the switch to go ahead – this is called the 'effective date'. This date must be at least 13 working days from when you complete the 'switching' form and we'll aim to complete the switch for this date.

If you're closing your existing account you can carry on using it until the 'effective date'.

What happens when we've received the 'switching' form?

- Within two working days we'll contact your current provider to advise them of your request to transfer your account to us.
 - Your current provider has five working days to provide us with the list of payments you've specified that you want to move. When we receive this list, we can start setting up these payments from your Coventry account. We aim to complete this switching within five working days.
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- If you've asked us to, we'll contact each individual payer who makes regular credits into your account, with your Coventry account details and the 'effective date'. (A payer is a company or individual who makes regular credits into your account e.g. your salary.)
 - If we've any information missing we'll contact your existing provider to try to obtain this information, however in certain circumstances, we may need to contact you directly.
 - We'll ask your existing provider to cancel all payments that are switched to your Coventry account.

Once the switching process has been completed we will:

- Send you a letter confirming that everything has been completed.

Will you share my personal data with third parties?

In order to complete the switching process we'll need to share your personal data with third parties.

We use your data to:

- Confirm your identity when you apply for an account or service.
- Assess your application for an account or service. Depending on the type of account you apply for, this may include assessing lending and fraud risks and credit scoring, for example, if you apply for credit (such as a mortgage).
- Set up and provide the accounts you have requested and keep our records up to date.
- Meet our legal and regulatory obligations and for crime prevention/detection.

Full details of our Privacy Policy can be found at: thecoventry.co.uk and selecting Privacy.

Will it cost me anything to transfer my payments to the Coventry?

No, the service is free.

What happens if I change my mind?

If you change your mind before we have started the switching process then the switch can be stopped, but if we've already started the process we may not be able to cancel it. Please contact any branch or agency or call our Customer Service Centre on 0800 121 8899.

Once the switch has taken place, how can I manage my account?

You can manage it:

- Online – if you have Online Services. If you don't already have online access call us on 0800 121 8899, and we can arrange access. If you already have a password set up, you can register for Online Services by going to thecoventry.co.uk
- Over the telephone.
- In any branch or agency.

What happens if I suffer any financial loss as part of moving my payments?

In the unlikely event that this happens as part of the switching process and it is our fault, we will reimburse you for the full extent of your loss.

What you should do if you wish to make a complaint about the service you have received?

If something's gone wrong, please let us know by phone, post or come into any branch.

We sort out most problems fairly and quickly. You can ask us for a copy of our leaflet, 'What to do if you have complaint' which explains the steps we follow when someone reports a problem.

If you're still not satisfied when we've finished our complaints procedure, you can take your complaint to the Financial Ombudsman Service.

For more information about the Ombudsman Service, visit their website: financial-ombudsman.org.uk

Coventry Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (www.fca.org.uk) and the Prudential Regulation Authority (firm reference number 150892).

Our Customer Service Centre is open Monday to Friday 8am-8pm, Saturday 9am-5pm, Sunday 10am-4pm. Calls to 0800 numbers are free when made from the UK. You may be charged for calls to all other numbers, please contact your service provider for further details. We may monitor, record, store and use telephone calls to help improve our service and as a record of our conversation.

Information correct at time of going to print (January 2017).

Get in touch



At a branch

For details of our opening hours, visit thecoventry.co.uk/branch-finder



Online

Visit us at thecoventry.co.uk



By phone

Call us on 0800 121 8899



By post

Write to us at Economic House, PO Box 9, High Street, Coventry CV1 5QN



When you have finished with
this booklet please recycle it

Coventry Building Society. Principal Office:
Economic House, PO Box 9, High Street, Coventry CV1 5QN.