

## Application Form

Please read the Key Features document before completing this form. Please return your completed form to Foresters Friendly Society to proceed with your application. If the child has any Tax Exempt Savings Plans (excluding Junior NISAs or Child Trust Funds) with this or any other Friendly Society, the total amount that can be invested on their behalf cannot exceed £25 per month.

### FOR OFFICE USE ONLY

Staff/FA/INT Name

Contact/FA/INT Number

Marketing Code

### 1. Your details

This Child Tax Exempt Savings Plan is a gift from:

Title  Mr  Mrs  Miss  Ms  Other

First name  Middle name(s)

Last name

Date of birth

Address

Postcode

Home telephone

(including STD code)

Email

Relationship to named child

### 2. Child's details

This Child Tax Exempt Savings Plan is a gift for:

Title  Child's first name

Middle name(s)

Last name

Date of birth

Address (if different from yours)

Postcode

If relevant, preferred branch no.

### 3. Regular contributions (how long do you want to save?)

The contribution level required for this Plan is £25 per month (from £15 if you apply online).

#### For how long do you want to save?

**EITHER:** Until the child reaches a 'special birthday'. Please enter the child's birthday e.g. 18th. (Minimum 10 years from now).

**OR:** For a specified number of years. Please enter the number of years e.g. 10. (Max. 25 years, min. 10 years).

Note that in either case this cannot be before the child's 16th birthday.

### 4. Instruction to your Bank or Building Society to pay by Direct Debit (please do not detach)



#### To The Manager

Name and full address of your Bank/Building Society branch.

Name(s) of Account Holder(s)

Sort Code  -  -

Account Number

Originator's Identification Number  9 1 5 6 4 9

Reference Number (office use only)

#### Instruction to your Bank or Building Society

Please pay Foresters Friendly Society Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Foresters Friendly Society and, if so, details will be passed electronically to my Bank/Building Society.

Signature  Date

Signature  Date

Banks/Building Societies may decline to accept instructions to pay Direct Debits from some types of account, such as a savings account.

Please turn over to continue and complete your Application

### The Direct Debit Guarantee (please detach this Guarantee for your records)



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Foresters Friendly Society will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Foresters Friendly Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Foresters Friendly Society or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society. – If you receive a refund you are not entitled to, you must pay it back when Foresters Friendly Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written notification may be required. Please also notify us.

## 5. Parent/Guardian details (if not the person setting up the plan)

Title      Mr    Mrs    Miss    Ms    Other

First name

Middle name(s)

Last name

Date of birth     

Address

Postcode

Home telephone

Mobile telephone

Email

## 7. Declaration

**This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information.**

**I wish to apply for the Foresters Child Tax Exempt Savings Plan.**

I have read and understood the Key Features document, and in applying for this plan, I declare that to the best of my knowledge and belief, the above statements are true and complete.

I confirm that the child does not currently hold a Friendly Society Tax Exempt Savings Plan with combined contributions (including that of this policy) in excess of £25 per month. I understand that all correspondence relating to the plan will be sent to the child's Parent/Guardian until the child's 16th birthday, and will be sent to the child after their 16th birthday.

I understand that the child will be entitled to Foresters Friendly Society surplus in the event of the closure of the Society only after having been a member for 5 years. I understand that a copy of the Rules and Memorandum are available upon request.

In cases where you are not the child's Parent/Guardian: I confirm that the child's Parent/Guardian consents to me setting up this savings account.

I confirm that I have not been given advice by Foresters Friendly Society in relation to the purchase of this plan.

Signature

Date

## 6. How we will use your data

The information that you provide on this form will be held by Foresters Friendly Society and used to set up and administer the policy for which you are applying and for other business purposes. Further information about how we hold and use your personal information is available on our website ([www.forestersfriendlysociety.co.uk/privacy-policy](http://www.forestersfriendlysociety.co.uk/privacy-policy)).

Where an application is made via a Financial Adviser (FA), you agree to your details being disclosed to that FA until you instruct us otherwise.

We (Foresters Friendly Society, including your Branch) would like to provide you with marketing communications about products, services and events which may be of interest to you by post, email and phone. By providing your details, you indicate your consent to receiving such communications from us. If you do not want to receive these communications, please tick the relevant box(es) below.

I do NOT wish to receive these communications from you by:    Post    Email    Phone

We would also like to share your personal information with third parties who provide complimentary financial products and services to our own so that they can provide you with marketing communications about products and services which may be of interest to you by post, email and phone. By providing your details, you indicate your consent to receiving such communications from those third parties. If you do not want to receive these communications, please tick the relevant box(es) below.

I do NOT wish to receive these communications from third parties by:    Post    Email    Phone

## How to get in touch

### Write to:

Foresters Friendly Society  
Foresters House  
29/33 Shirley Road  
Southampton, SO15 3EW

Tel: 0800 783 4162

Fax: 023 8022 9657

Visit: [www.forestersfriendlysociety.co.uk](http://www.forestersfriendlysociety.co.uk)

Information, including a copy of this Application Form, is available in large print, audio and Braille upon request.

Foresters Friendly Society is the trading name of The Ancient Order of Foresters Friendly Society Limited which is an Incorporated Friendly Society (Registration No. 511F) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Registration No. 110029).